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SETTING FINANCIAL GOALS

A quick-start guide.

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BRAINSTORM

Write down all the things you want your money to do for you.

Wealth.

Health.

Happiness.

PRIORITIZE

Pick the highest priority wants and write them in the order you want to achieve them.

Wealth.

1.

2.

3.

4.

5.

Health.

1.

2.

3.

4.

5.

Happiness.

1.

2.

3.

4.

5.

PLAN

Use the S.M.A.R.T. method of goal setting to create your plan of action.

Wealth.

1.

2.

3.

4.

5.

S - Specific: The goal you're setting must be clear and specific in defining the area you're trying to improve.

M - Measurable: You must be able to quantify progress so you know, without a doubt, when the goal is achieved.

A - Assignable: Be clear about who is doing the work (in most cases it'll be You, but in some it may involve your partner, roommate, etc)

R - Realistic: It doesn't do you any good to set a hugely unreachable goal right off the bat. Break huge goals down into smaller, more realistic pieces.

T - Time-Related: Set a date for when you want to achieve the goal by. Simple as that.

PLAN

Use the S.M.A.R.T. method of goal setting to create your plan of action.

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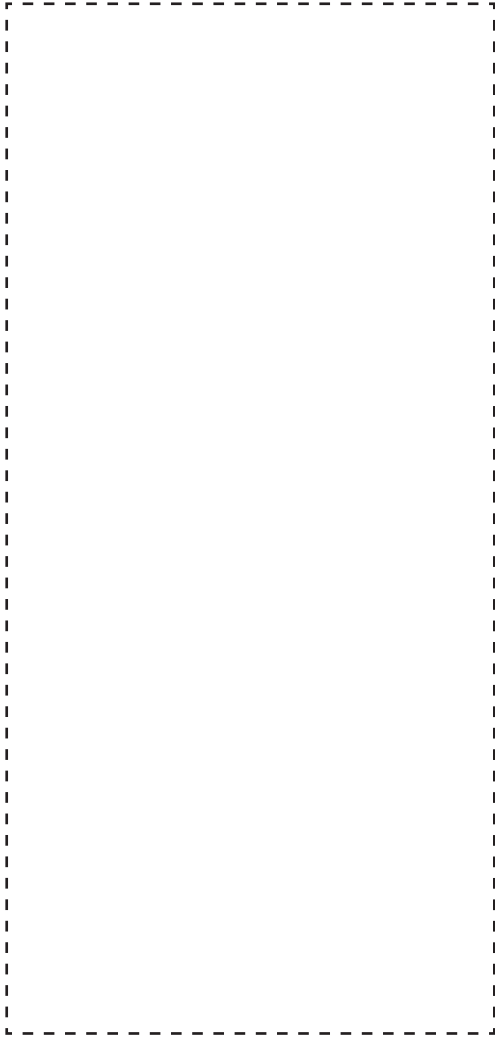
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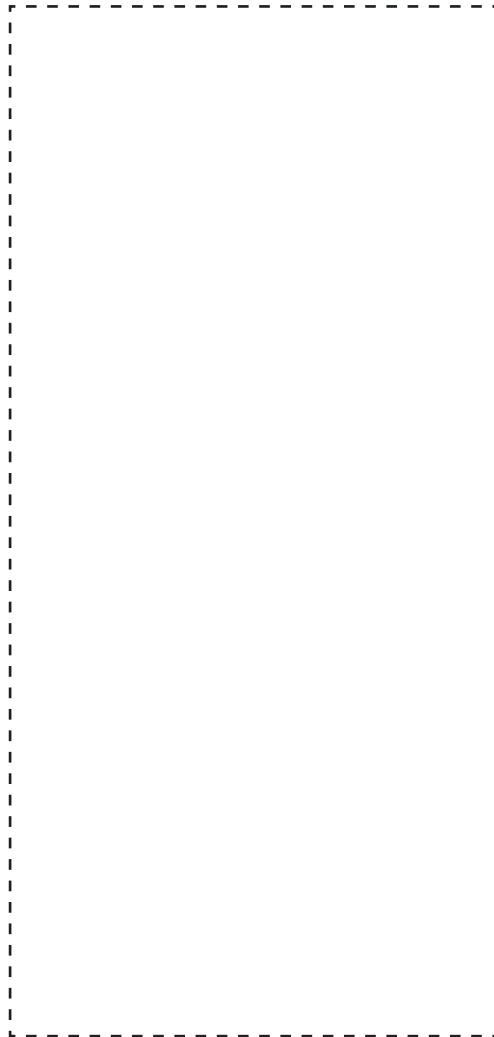
DEFINE TACTICS

What changes will you have to make in order to achieve your goals?

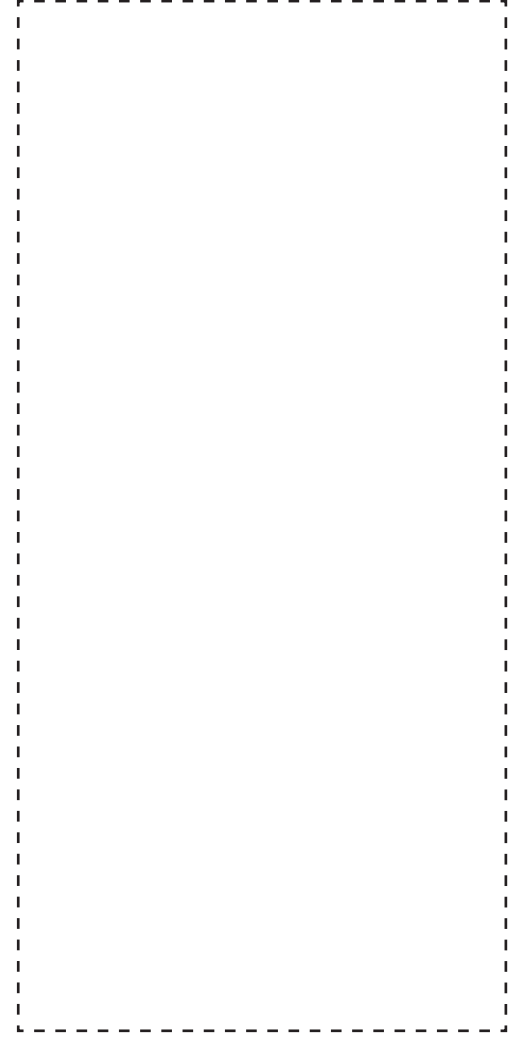
Wealth.



Health.



Happiness.



STAY ACCOUNTABLE

Use this daily habit tracker to mark off each day you successfully work toward your goals.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	

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