

MAP YOUR FINANCIAL FUTURE

Goal Setting Workbook

*Where you are. Where you want to be.
And the space in between.*

WELCOME

We're glad you're here.

Goals don't need to be perfect. They just need to be yours.

This workbook gives you the space to think about where you are financially, where you want to be, and what it might take to get there. No pressure. No deadlines. Just clarity.

There are four parts:

| **Part One:** Where are you right now?

| **Part Two:** Where do you want to be?

| **Part Three:** The space in between.

| **Part Four:** Your goals.

Take your time. Write honestly. Come back to this whenever you need to remember what you're working toward.

The first step is deciding you want something different.

— Dollars & Sense

PART ONE

Where are you right now?

Don't overthink this. Just write what comes to mind.

How would you describe your relationship with money today?

What's one thing about your finances that keeps you up at night?

A few more honest questions.

Take your time. There's no rush.

What's one thing about your finances you actually feel good about?

What does 'being good with money' mean to you?

PART TWO

Where do you want to be?

Dream a little. There are no wrong answers here.

In 6 months, what do you want to be true about your money?

In 1 year, what would make you feel proud?

Keep dreaming.

What does your future look like when money isn't a source of stress?

In 5 years, what does financial clarity look like for you?

What does financial clarity feel like? Describe the feeling, not the number.

PART THREE

The space in between.

What stands between where you are and where you want to be?

What's the biggest obstacle between you and your financial goals?

What's one habit that's holding you back?

Now let's move forward.

Small steps still count.

What's one thing you could start doing this month to move closer?

Who or what could help you stay on track?

PART FOUR

Write it down. Make it real.

Be specific. Make them yours.

Goal 1

My goal:

Why this matters to me:

My first step:

Goal 2

My goal:

Why this matters to me:

My first step:

Goal 3

My goal:

Why this matters to me:

My first step:

BEFORE YOU GO

One last reflection.

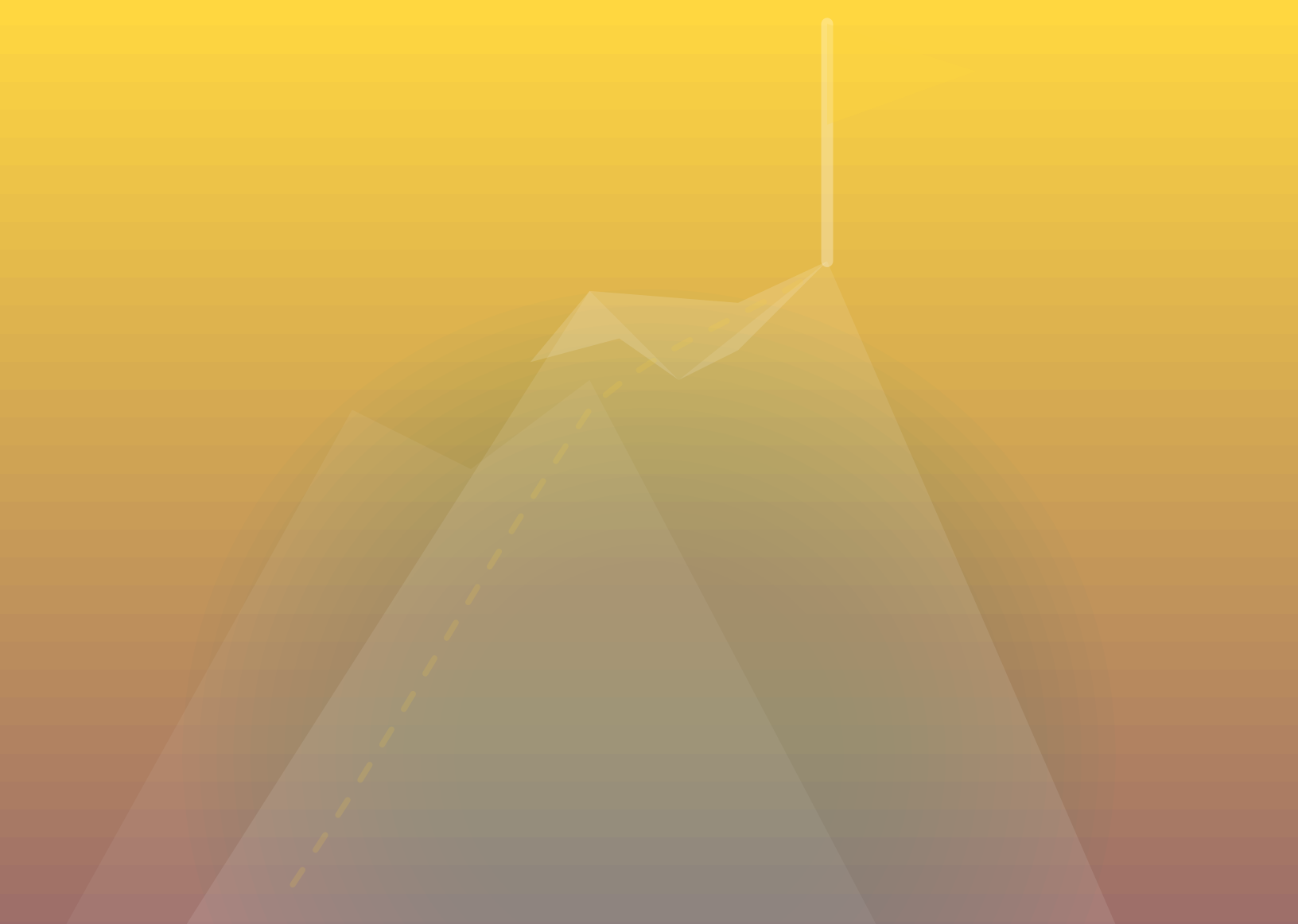
Now that you've written your goals, sit with this for a moment.

What will it feel like when you reach these goals?

What do you want to say to yourself a year from now?

You don't need to see the whole path. You just need the next step.

— Dollars & Sense



Now you have a map.

You know where you are. You know where you want to be.
The rest is one step at a time.

The tool is here when you're ready to start moving.

Ready to put your goals into action?

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