



SMART Goals Worksheet

Improving your financial life requires planning, and that starts with setting goals that are Specific, Measurable, Achievable, Results based and Time-bound (SMART). Share your goals with an “accountabilibuddy” and set specific dates to check-in on progress. Don’t forget to celebrate your successes!

Short-Term Goals (1-3 years)

Example: I want to save \$200 in an emergency fund every month for the next 12 months. I will report my progress on the last Monday of the month to my accountabilibuddy.

I want to	
This amount	
This often	
For this long	
I commit to the following check-in:	

Medium-Term Goals (3-5 years)

Example: I want to save \$10,000 over the next three years for a house down payment. I will check in with my accountabilibuddy every three months.

I want to	
This amount	
This often	
For this long	
I commit to the following check-in:	

Long-Term Goals (5-10 years)

Example: I want to invest at least \$5,000 per year in my retirement funds for the next five years. I will check in with my accountabilibuddy every six months.

I want to	
This amount	
This often	
For this long	
I commit to the following check-in:	