CF Futures

FINANCIAL GOALS PLANNER

Turning intention into action

A budget helps you manage today. Goals help you build tomorrow.

Financial goals work best when they are:

- Specific
- Measurable
- Time-based
- Realistic
- Written down

My 1-Year Financial Goals

Think about what you would like to achieve in the next 12 months.

Examples:

- Build an emergency fund
- Save for travel
- Pay off a credit card
- Start a health buffer
- Save for study
- Reduce debt

Goal Planner

Goal	Target Amount	Monthly Contribution	Deadline
	$	$	
	$	$	
	$	$	

Priority Areas

Emergency Fund

Target: $ _____

Current saved: $ _____

Gap: $ _____

Monthly amount I will set aside: $ _____

Travel / Life Experiences

Destination or purpose: _____

Total cost estimate: $ _____

Monthly savings needed: $ _____

Study / Professional Development

Course or goal: _____

Cost: $ _____

Savings plan: _____

MY 5-YEAR FINANCIAL VISION

This is about stability and bigger milestones. Think long-term.

Home Deposit

Target property price estimate: $ _____

Deposit needed (e.g. 10–20%): $ _____

Savings timeframe: _____

Monthly amount required: $ _____

Health Buffer

Additional long-term health savings target: $ _____

Purpose:

□ Future treatments

□ Reduced work capacity

□ Relocation for care

□ Equipment upgrades

Career & Income Growth

In 5 years, I would like my income to be: $ _____

What needs to happen to reach this?

□ Further study

□ Promotion

□ Career change

□ Side income

□ Business

Steps I can take this year:

_____

_____

ACTION PLAN

Choose ONE priority to focus on first.

My top goal right now:

_____

_____

Why this matters to me:

_____

_____

First small step this month:

_____

_____

Automatic transfer amount: $ _____

Start date: _____

Reflection

If my health fluctuated, would these goals still feel achievable? What adjustments might I need?

_____

_____

_____

_____