

## Finance Goals & Vision Board

Saving money is most effective when it's tied to a purpose that truly excites you. This worksheet will help you transform vague wishes into concrete goals. Be specific, think about what you truly value, and connect every dollar you save to the life you want to build.

### Short-Term Goals (The Next 12 Months)

*What do you want to achieve in the near future? This could be paying off a high-interest credit card, building an emergency fund, or saving for a memorable experience.*

#### Goal 1:

- **What is my specific goal?** (e.g., *Build a \$1,000 emergency fund*)

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- What is the target amount?

\$ \_\_\_\_\_

- **Why is this important to me? What deeper value does it fulfill?** (e.g., *To create a sense of security and peace of mind, knowing I can handle unexpected expenses without stress.*)

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#### Goal 2:

- **What is my specific goal?**

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- What is the target amount?

\$ \_\_\_\_\_

- **Why is this important to me? What deeper value does it fulfill?**

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## Mid-Term Goals (The Next 5 Years)

*Look a little further ahead. What significant milestones do you envision for yourself? Think about major purchases, career changes, or investments in your personal growth.*

### Goal 1:

- **What is my specific goal?** (e.g., *Save for a down payment on a sunny apartment with a balcony.*)

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- What is the target amount?  
\$ \_\_\_\_\_

- **Why is this important to me? What deeper value does it fulfill?** (e.g., *To have a beautiful, stable, and personal space that I own and can make my sanctuary.*)

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### Goal 2:

- **What is my specific goal?**

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- What is the target amount?  
\$ \_\_\_\_\_

- **Why is this important to me? What deeper value does it fulfill?**

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## Long-Term Goals (10+ Years From Now)

*Think about the grand vision for your life. What will provide you with lasting security, freedom, and fulfillment in the decades to come?*

### Goal 1:

- **What is my specific goal?** (e.g., *Fully fund my retirement accounts to allow for travel and hobbies.*)

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- What is the target amount?  
\$ \_\_\_\_\_

- **Why is this important to me? What deeper value does it fulfill?** (e.g., *To achieve financial independence, giving me the freedom to choose how I spend my time and pursue my passions without financial worry.*)

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### Goal 2:

- **What is my specific goal?**

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- What is the target amount?  
\$ \_\_\_\_\_

- **Why is this important to me? What deeper value does it fulfill?**

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## **My Vision Board**

This is your canvas. A space to visually represent the goals you've just defined. Cut out pictures, print images, draw, or write words and quotes that bring your aspirations to life. The more vivid and personal you make it, the more powerful it will be. Place this somewhere you will see it every single day as a reminder of the amazing future you are building.