

Setting Effective Financial Goals

LONG-TERM		Time Frame:	
Big goal(s) and aspirations			
GOAL		Measure	By When
1			
2			
3			

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MEDIUM-TERM		Time Frame:	
Steps linked to long-term goals			
GOAL		Measure	By When
1			
2			
3			
4			
5			

SHORT-TERM		Time Frame:	
Drives Action and Builds Systems			
GOAL		Measure	By When
1			
2			
3			
4			
5			

Check-In Plan	Frequency	1	2	3	4
Long Term					
Medium Term					
Short Term					