Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**What Are My Financial Goals for the Future?**

Becoming financially literate begins with defining your goals and being motivated to learn about financial management. Review the Financial Security Checklist below and think of your own goals for financial security.

**Financial Security Checklist**

Place a checkmark next to the items that are important to you.

\_\_\_\_\_Reduce stress and worry about money.

\_\_\_\_\_Pay my basic expenses such as food, transportation, and shelter.

\_\_\_\_\_Pay my bills on time.

\_\_\_\_\_Have a good credit score.

\_\_\_\_\_Own my own home.

\_\_\_\_\_Purchase a car.

\_\_\_\_\_Have money for vacations.

\_\_\_\_\_Save for retirement.

\_\_\_\_\_Purchase new clothes and shoes.

\_\_\_\_\_Contribute to charity.

\_\_\_\_\_Help my parents as they get older.

\_\_\_\_\_Change the world for the better.

\_\_\_\_\_Be happy with my life.

\_\_\_\_\_Have an enjoyable career that matches my interests and talents.

\_\_\_\_\_Pay for entertainment (concert tickets, movie tickets, meals in restaurants)

List some other financial goals that are important to you.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Meet with a small group of students in your class. Share your important financial goals and why they are important to you.

Make a list of your top five goals for financial security

1.

2.

3.

4.

5.

Review your financial goals in the above question. It is likely that these ideas are broad general statements. To create financial goals for the future, you will need to break them into manageable steps. Here are some examples of specific, measurable, and achievable steps to accomplishing your goals:

* Learn about money management.
* Get in the habit of saving money.
* Learn about investments.
* Create a budget.
* Limit expenses.
* Set a date to get started.

Write 5 intention statements about achieving your goal of financial security.

1.

2.

3.

4.

5.

Your instructor will ask for volunteers to share some of your intention statements.