SAVINGS GOAL WORKSHEET

Turn a financial goal into a clear, trackable plan.

My savings goal: _____

Why this goal matters: _____

Target amount: _____ Target date: _____

1. Know Your Starting Point

CURRENT SAVINGS

$ _____

AMOUNT STILL NEEDED

$ _____

2. Break the Goal Into Smaller Targets

Frequency	Amount I Need to Save
Per Month	$ _____
Per Paycheck	$ _____
Per Week	$ _____
Per Day	$ _____

3. My Savings Strategy

Automatic transfer amount: $ _____ Transfer day: _____

Expense I can reduce or pause: _____

Extra income I can put toward this goal: _____

Account or place where I will keep the savings: _____

4. Action Steps

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Small, consistent deposits can turn a large goal into an achievable plan.

SAVINGS PROGRESS TRACKER

Record deposits, watch your balance grow, and adjust your plan when needed.

Date	Deposit	Running Balance	% of Goal	Notes
Savings goal:			**Target:**	

Milestone Checkpoints

25%

Date reached: _____

50%

Date reached: _____

75%

Date reached: _____

100%

Date reached: _____

Monthly Check-In

What helped me save this month?

What got in the way?

What will I change next month?

Review your plan regularly and update the target if your income, expenses, or timeline changes.