

Bridges Twin's Goal Worksheet

This worksheet is to be used when you are setting new goals. We encourage you to download, make a copy, or as crazy as it might sound...print out a copy.

Step 1: What is the Goal?

- House down payment
- Car down payment or outright purchase of a car
- Saving for retirement
- Saving for a child's college or a loved ones college or someone you really like that you want to help them go to college
- Other: _____

Step 2: what priority does this goal take in your financial world?

Please select a number from below.

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

Step 3: How much do you need for your goal?

- What is the total cost of the item desired to be purchased?
 - \$ _____
- What % of this item do you desire to pay at time of purchase?
 - 10%

- 20%
- 30%
- 40%
- 60%
- 70%
- 80%
- 90%
- 100%
- _____% X \$ _____ = \$ _____

Step 4: how much are you willing to contribute on a regular interval for this goal?

- Goal Amount: \$ _____
- Monthly Amount Toward Goal: \$ _____
- Number of Months to goal: Goal Amount _____ / Monthly Amount
\$ _____ = Number of Months _____