

FINANCIAL LITERACY

Goal Setting Worksheet

Top 5 Values	Top 5 Financial Goals	Make specific, measurable, attainable, action-oriented	48-Hour Plan (What actions will you take in the next 48 hours?)	Enlist Help (Who will you share your goals with?)	Time-Frame (When will you finish?)
Example: 1. Security	Increase net worth by 10% next year.	Increase contributions to RRSP by \$200 per paycheque.	Call benefits person at work. Change contributions plan by Friday.	Call Pete (financial advisor) to review investment options in RRSP.	In 2 weeks, the new investment plan will begin.
2. Family					
3. Health					
4. Self-realization Self-development					
5. Community					