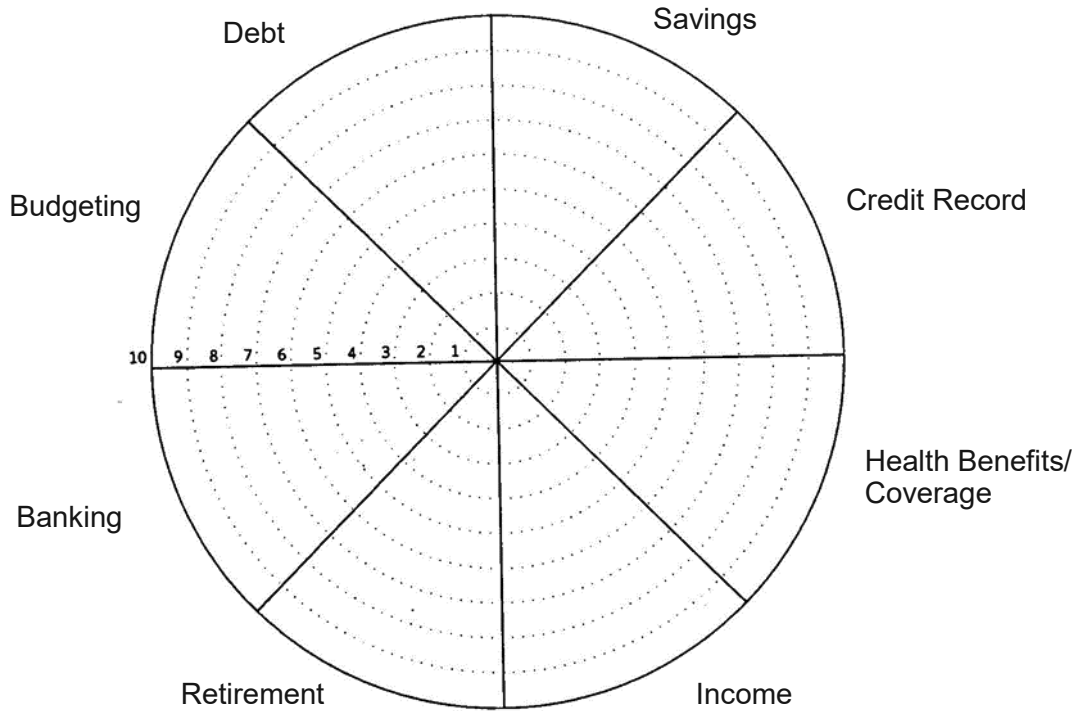


# Financial Goal Setting Wheel

Rate your comfort level in each of these financial areas with 0 being low and in the middle of the circle and 10 being high and at the outside of the circle.



## Goal Setting

1. Which area do you want to improve?

Savings

Budgeting

Health Benefits/Coverage

Credit Record

Banking

Income

Debt

Retirement

2. What financial goal could you set for that area?

*My goal is...* \_\_\_\_\_

\_\_\_\_\_

3. What could you do in the next few weeks to make progress towards that goal?

*I will...* \_\_\_\_\_

\_\_\_\_\_

# Financial Goal Setting Scale

1. Circle the number that shows how comfortable you feel in each of the following areas with 0 being low and 10 being high.

	Low										High
Budgeting	0	1	2	3	4	5	6	7	8	9	10
Debt	0	1	2	3	4	5	6	7	8	9	10
Credit Record	0	1	2	3	4	5	6	7	8	9	10
Banking	0	1	2	3	4	5	6	7	8	9	10
Savings	0	1	2	3	4	5	6	7	8	9	10
Health Benefits/Coverage	0	1	2	3	4	5	6	7	8	9	10
Housing	0	1	2	3	4	5	6	7	8	9	10
Income	0	1	2	3	4	5	6	7	8	9	10
Retirement	0	1	2	3	4	5	6	7	8	9	10

2. Which one area do you want to improve?

- Savings                       Budgeting                       Health Benefits/Coverage  
 Credit Record                       Banking                       Income  
 Debt                       Retirement

3. What financial goal could you set for that area?

*My goal is...* \_\_\_\_\_  
 \_\_\_\_\_

4. What could you do to make progress towards that goal?

*In the next **week**, I will* \_\_\_\_\_  
 \_\_\_\_\_

*In the next **month**, I will* \_\_\_\_\_  
 \_\_\_\_\_

# Action Planning Tool

What results do you want? What is your outcome?

---

---

---

This outcome is important to me because...

---

---

---

What steps do you need to take?

---

---

---

What support do you need to be successful?

---

---

---

What is your deadline for achieving this result?

---

---

---

How would you like to check in on your progress?

---

---

---