



SET YOUR FINANCIAL GOALS

Healthy financial habits start by setting sound financial goals. Develop a realistic path to achieving your goals by filling in the chart below.

General Information			
Monthly Household Net Income:	Number of Dependents:		
Monthly Necessary Expenses:	Your Age:		
Amount Remaining to Save for Goals: \$0.00	Expected Graduation Date: Month Year		
Identify goals, cost, timeline, savings method, and anticipated rate of return.			
Set your goals	Goal #1: Car Down Payment	Goal #2: 3-month Emergency Fund	Goal #3: Pay Off Student Loans in 5 Years
Total cost of each goal	\$0.00	\$0.00	\$0.00
Current funds available	\$0.00	\$0.00	\$0.00
Time needed to achieve each goal	months/years	months/years	months/years
Monthly contribution to achieve goal	\$0.00	\$0.00	\$0.00
Funding source for monthly contribution	ex. tax refund	ex. paycheck	ex. paycheck
Method for saving/investing for goal	ex. checking account	ex. savings account	ex. paying on loan
Expected interest rate/rate of return	%	%	ex. paying 8.25% interest

There could be risks that might keep you from reaching your goals.
In many cases, insurance can help protect against these risks.

Risks: Identify risks below that could keep you from reaching your goals and then check the boxes for any insurance you have that can protect you from each risk.	Types of Insurance with Monthly Cost					
	Life \$0.00	Health \$0.00	Disability \$0.00	Auto \$0.00	Home/Renters \$0.00	Other: \$0.00
Car accident						
Disability, expensive emergency						
Job loss						

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