

Setting Goals and Planning Ahead



NAME _____

DATE _____

BELLWORK

Question:

Answer:

Why is it important to set financial goals for yourself?

DISCUSSION NOTES

Criteria

Description

S:

M:

A:

R:

T:

GOAL SETTING ACTIVITY

INCOME

Source 1: \$

Source 2: \$

Source 3: \$

Total \$

SETTING YOUR GOALS

Goal Type	Description
Short-term	
Mid-term	
Long-term	
Checkpoint: Do your goals meet the SMART criteria?	

EXIT TICKET

Question:

Write a one-sentence action item to help you get started soon for each of your three goals.

Answer:

1.

2.

3.