EVERFI®

Grow: Financial Planning for Life™

Balancing Expenses and Savings

NAME ______________________ **DATE** ______________

SMART GOALS GRAPHIC ORGANIZER

INSTRUCTIONS

List your financial goals and then determine if they are short-, mid-, or long-term and where you would most likely put your money as you save for the goal.

	What does the letter stand for?	What action are you doing when writing a goal for this letter?	What is an example?
S			
M			
A			
R			
T			

QUESTION

How could having SMART goals help Perry balance his expenses and his savings?

INSTRUCTIONS

Now it's your turn to establish some SMART goals for yourself. There is space on this page to complete two goals but feel free to write more on separate sheets of paper.

What is a financial goal that you would like to achieve?

Write how each letter of SMART can connect to your goal.

S

M

A

R

T

Write your SMART goal here.

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Write how each letter of SMART can connect to your goal.

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Write your SMART goal here.