



**CLEAR CREEK**  
FINANCIAL MANAGEMENT

# **FINANCIAL PLANNING GOAL WORKSHEETS**



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FINANCIAL MANAGEMENT



Thank you for checking out Clear Creek's Financial Planning Goal Worksheet. We are confident that this will provide an organized space for you to write out some clear goals for your life and finances.

As fiduciary advisors, our mission is to provide you peace of mind through sound financial planning. We equip our clients with world-class education, advice, and investment expertise to enable them to reach their financial goals. We service clients in all walks of life and have different service levels to meet our clients individual needs.

If you're looking for a team to help you reach these goals or have some questions about a financial plan, please use the link below to [contact us!](#)

Joe Gates, Brian Deely, & Ben Warren



# Worksheet Instructions

In this financial planning resource, we've included two types of goal worksheets: a high level worksheet and a details worksheet. Invite trusted friends or family into the process. They can be a great sounding board and support system.

## **High Level Worksheet:**

These worksheets allow you to collect all your financial and life goal statements in one place.

- 1) For each goal, assign a Time Horizon. This will either be short-term (0 - 24 months), medium-term (2-5 years), or long-term (5+ years).
- 2) Then write down a goal statement using the SMARTER methodology. **S**pecific, **M**easurable, **A**chievable, **R**elevant, **T**ime-bound, **E**xciting, **R**elevant.

## **Goal Detail Worksheets:**

- 1) Enter a goal Title.
- 2) Give it a completion date.
- 3) Write your goal statement doing your best to stick with the SMARTER framework.
- 4) Write some reasons why this goal is important to you. This will help to keep you motivated and focused.
- 5) Add some attainable steps that will help you move towards achieving the goal.

Finally, have FUN!! This is your future, it should be exciting and inspiring. Enjoy the planning process!

# High Level Goal Examples

#	Time Horizon	GOAL STATEMENT / Write financial and life goals here.
1	Medium	In 4 years, I will buy a small RV and spend 1 year visiting all the National Parks in the United States.
2	Short	In 12 months, I want to max out my annual Roth IRA and triple my total savings.
3	Long	In 18 years, I want to be able to pay for 75% of my child's college education.

# Goal Detail Example

Goal Title: National Park Tour

Target Date: 1/1/2025

Goal Summary: Write financial and life goals below.

In 4 years, I will buy a small RV and spend 1 year visiting all the National Parks in the United States.

Why is this goal important? Rank your key reasons.

1	I've wanted to see all the National Parks since I was a child.
2	I love camping, hiking, and living outdoors.
3	I've traveled all over the world for a year and in that journey realized how much of my own country I have not seen. I want my children to experience the United States before visiting the rest of the world.

What are some action steps that you can take to get to the goal?

1	Sit down and decide what the trip will cost.
2	Create an automated savings plan that moves money each month to a special bank account.
3	Begin to plan for kids to be homeschooled for 1 year.
4	Plan for working remotely for a year.





# GOAL DETAILS:

Goal Title:

Target Date:

Goal Summary: Write financial and life goals below.

Why is this goal important? List your key reasons.


What are some action steps that you can achieve to get to the goal?




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Thank you for checking out Clear Creek's Financial Management's Planning Goal Worksheet. We hope this was helpful and would love to hear stories about your goals and dreams.

Send us an [email](#) with your story. We are always looking for stories to share on our social media and website that will encourage and inspire others.

If you looking for a team to help you reach these goals or have some questions about a financial plan, please use the link below to [contact us!](#)

Also, don't be a stranger and follow us on social media.

Joe, Brian, & Ben

