








Goals worksheet.

As a couple, it's important to work out how to develop and prioritise both your personal and joint goals.



How to use this worksheet.

Each column represents one of the following statements. Filling in the table can help you and your partner get an overall picture of your shared goals, their priority, cost, time frame and how you both intend to reach them.

 Personal & couple goals	 Rating	 Short / medium / long term	 Total cost	 Time frame	 Savings	 Notes
What are your individual and couple financial goals for the next five years?	Rate each goal according to how important it is (most to least) for you and your partner.	Decide if the goal is short, medium or long term. Tip: You can do this together or think about it individually and then talk your goals through.	How much will each goal cost? (A rough idea is okay for now – this can change over time.)	How long will it take to achieve each goal?	How much will you need to save each week/fortnight/month/year to achieve each goal? (Amount needed divided by the time in weeks/fortnights/months/years equals your saving amount).	What other steps do you need to take to achieve these goals? (Are you considering a loan, will you start a side hustle to earn more money?)

Example.

Trip to America	2/5	Short Term	\$7,000	7 months	\$1,000 per month	\$500 contributed from loan
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Personal & couple goals	Rating	Short / medium / long term	Total cost	Time frame	Weekly / fortnightly / monthly savings	Notes
			\$		\$	
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			\$		\$	

Key.

Rating
 1 being least important, 5 being most

Short term
 Less than 1 year

Medium term
 1-5 years

Long term
 More than 5 years

