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Setting Goals Assessment

If you don't know where you are going, how are you going to get there? Everyone has vague ideas swirling around in their head about where they want to be financially, but very few actualize them. The first step is to define what you want, determine where you want to be, and write down your goals. This is one of the key differences between financial mediocrity and success.

What is financial freedom to you? To some people it is having as much money as Donald Trump, to some it may be just enough to live in paradise. Everyone is different, so you want to make sure you write down what it is to you...right now, because it can change over time. Define it. I recommend reassessing your definition and your goals at least annually.

Once you have financial freedom defined for you, start setting goals. Break it down between short term and long term. An example of a short term goal might be, "I want to pay off my car by the end of this calendar year." An example of a long term goal might be, "I would like to have \$50,000 saved for my six year olds college education by the time he is 18."

The three attached Goal Setting worksheets will help you, your significant other, and whole family take action and start setting your financial goals now. *You have the power to determine your financial future and to realize your goals.*

Here are some questions to get you thinking:

Short-term

- What is your current financial burden and how can you put a plan together to take care of it?
- What about your financial situation keeps you up at night?
- How might you save money in some areas of your life?
- Where would those funds be better spent?

Long-term

- What have you always wanted to do but it seems like too big of a dream?
- What would make you feel secure for your future?
- How can you provide for your family and yourself in the future?

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