

THE 3-BUCKET FINANCIAL GOALS WORKSHEET



PERSONAL INFORMATION

- Name: _____
- Date: _____
- Current Monthly Income: \$ _____

THE PARACHUTE BUCKET

EMERGENCY FUND GOALS

- Current Savings: \$ _____
- 6-Month Target: \$ _____
- 12-Month Target: \$ _____

ESSENTIAL MONTHLY EXPENSES

<i>Expense Category</i>	<i>Current Amount</i>	<i>Target Amount</i>
Housing	\$ _____	\$ _____
Utilities	\$ _____	\$ _____
Food	\$ _____	\$ _____
Transportation	\$ _____	\$ _____
Insurance	\$ _____	\$ _____

<i>Expense Category</i>	<i>Current Amount</i>	<i>Target Amount</i>
Debt Payments	\$_____	\$_____

THE GROWTH BUCKET

INITIAL INVESTMENT: \$100 GROWTH TARGETS

<i>Target Level</i>	<i>Goal Amount</i>	<i>Timeline</i>	<i>Dreams Reward</i>
Level 1	\$1,000	_____	\$500
Level 2	\$5,000	_____	\$2,500
Level 3	\$25,000	_____	\$12,500

ONLINE BUSINESS GOALS

- Affiliate Marketing: \$_____/month
- Digital Products: \$_____/month
- Email List Size: _____ subscribers

THE DREAMS BUCKET

REWARD PLANNING

<i>Achievement</i>	<i>Reward</i>	<i>Estimated Cost</i>
First \$1,000	_____	\$_____

<i>Achievement</i>	<i>Reward</i>	<i>Estimated Cost</i>
First \$5,000	_____	\$_____
First \$25,000	_____	\$_____

Action Steps Next 30 Days

- 1.
- 2.
- 3.

90-Day Strategy

- 1.
- 2.
- 3.

Remember: Update this worksheet monthly and celebrate every milestone achieved!