FUTURE FINANCE HUB

EMPOWERING THE NEXT GENERATION THROUGH FINANCIAL LITERACY

Financial Goal Workbook

Set, track, and achieve your financial goals with structured planning and accountability.

What's Inside

- How to Use This Workbook
- Financial Goal Setting
- Action Plan Builder
- Weekly Progress Tracker
- Monthly Review & Celebration

Designed for High School Students | Printable & Fillable

How to Use This Workbook

This workbook helps you define clear financial goals, break them into actionable steps, and track your progress over time. Use it to turn your dreams into a concrete plan.

1 Step 1: Define Your Goals

Identify 3-5 financial goals — short-term (1-3 months), medium-term (6-12 months), and long-term (1-5 years).

2 Step 2: Create Action Plans

Break each goal into specific monthly actions with deadlines and dollar amounts.

3 Step 3: Track Weekly Progress

Check in each week to log savings, spending changes, and milestones reached.

4 Step 4: Review & Celebrate

At the end of each month, review your progress and celebrate wins — no matter how small.

💡 Pro Tip

Start with just one goal. Once you build momentum, add more. Progress beats perfection every time!

Financial Goal Setting

Define up to 5 financial goals. Be specific about the amount, timeline, and why each goal matters to you.

Short-Term Goals (1-3 months)

Goal	Amount	Deadline	Why It Matters

Medium-Term Goals (6-12 months)

Goal	Amount	Deadline	Why It Matters

Long-Term Goals (1-5 years)

Goal	Amount	Deadline	Why It Matters

Pro Tip

Use the SMART framework: Specific, Measurable, Achievable, Relevant, Time-bound. Vague goals lead to vague results.

Action Plan Builder

Break each goal into monthly action steps. Assign a specific dollar amount and deadline to each action.

Goal 1:

Action Step	Amount	Deadline	Status

Goal 2:

Action Step	Amount	Deadline	Status

Goal 3:

Action Step	Amount	Deadline	Status

💡 Pro Tip

Focus on actions you can control. "Save $50/week" is better than "hope I have money left over."

Weekly Progress Tracker

Review your progress toward each financial goal. Celebrate wins and adjust your plan where needed.

Goal Progress Summary

Goal	Target	Saved	% Done	On Track?

Monthly Check-In

1. Which goal am I closest to achieving?

2. What obstacles slowed my progress this month?

3. What adjustments do I need to make next month?

4. What am I most proud of this month?

Wins to Celebrate

1.

2.

3.

"The secret of getting ahead is getting started."
- Mark Twain

Monthly Review & Celebration

Reflect on your month, celebrate progress, and set intentions for the next month ahead.

Monthly Summary

Category

Monthly Reflection

1. What financial win am I most proud of this month?

2. Where did I fall short, and what can I learn from it?

3. What habit helped me the most this month?

4. What is my #1 focus for next month?

Wins to Celebrate 🎉

1.

2.

3.

"Small progress is still progress. Celebrate every step forward."
- Unknown