



Financial Goal-Setting Tool

Select and prioritize your top three **post-insolvency** financial goals and fill in the blanks with your personal goal information. If you cannot find three goals from the list which are important to you, create your own, but make sure they are SMART (Specific, Measurable, Achievable, Relevant, and Time-bound)!

Bring your top three financial goals to your in-person counselling session. You will discuss your financial goals and set a plan to achieve them with your counsellor.

Priority	Financial Goals
	Open a bank account by <input type="text"/> <small>select date</small>
	Set up a savings account by <input type="text"/> <small>select date</small>
	Set up automatic payments for <input type="text"/> <small>insert expense</small> by <input type="text"/> <small>select date</small>
	Set up an automatic monthly transfer of \$ <input type="text"/> <small>insert amount</small> to my savings account by <input type="text"/> <small>select date</small>
	Select a record keeping method and begin tracking all my expenses <input type="text"/> <small>select date</small>
	Increase my income by \$ <input type="text"/> <small>insert amount</small> every <input type="text"/> <small>insert period</small> through <input type="text"/> <small>insert method increasing income</small> by <input type="text"/> <small>select date</small>
	Reduce <input type="text"/> <small>insert expense</small> every <input type="text"/> <small>insert period</small> by \$ <input type="text"/> <small>insert amount</small> by <input type="text"/> <small>select date</small>
	Save \$ <input type="text"/> <small>insert amount</small> every <input type="text"/> <small>insert period</small> so I have \$ <input type="text"/> <small>insert amount</small> for <input type="text"/> <small>insert goal</small> by <input type="text"/> <small>select date</small>
	Save \$ <input type="text"/> <small>insert amount</small> every <input type="text"/> <small>insert period</small> so I have \$ <input type="text"/> <small>insert amount</small> for <input type="text"/> <small>insert goal</small> by <input type="text"/> <small>select date</small>
	Save \$ <input type="text"/> <small>insert amount</small> every <input type="text"/> <small>insert period</small> so I have \$ <input type="text"/> <small>insert amount</small> for <input type="text"/> <small>insert goal</small> by <input type="text"/> <small>select date</small>

Create your own SMART Financial Goals

Priority	Financial Goals
	<input type="text"/> <small>insert goal</small> by <input type="text"/> <small>select date</small>
	<input type="text"/> <small>insert goal</small> by <input type="text"/> <small>select date</small>
	<input type="text"/> <small>insert goal</small> by <input type="text"/> <small>select date</small>