

Savings Goal Action Plan

Name: _____

Date: _____

SMART Criteria: ☐ Specific ☐ Measurable ☐ Attainable ☐ Relevant ☐ Time-Bound

❶ Pick a goal that saving can help you achieve.

By when:

❷ Calculate a savings target to plan for your goal.

Total amount needed

\$

Ex. \$400

Time to reach goal

÷

Ex. 20 weeks

Amount to save

=

\$

Ex. \$20 per week

Tip: Think about how often you can set aside money for your goal and pick a frequency that fits your needs, like once a week, once a month, or once per paycheck.

❸ Determine your next steps to reach your goal.

Steps to take	What I need	Target Date	Done?
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

❹ Recognition: _____

❺ What is your main potential challenge to achieving this goal? What is one thing you can do to overcome this challenge?