





Example goals

Make sure you put the amount and time period next to each one.

Short Goal (1-3 years)

Needs	Wants
 Pay off credit card by Feb 2020 £2000	 Save for holiday to India £2500
 Have a baby / save for IVF £_____	 Buy a puppy £_____

Short term goals are usually kept in cash.

Medium Goal (4-6 years)

Needs	Wants
 Buy a car £_____	 Start a business or side hustle £_____
 Buy a house £_____	 Renovate the house £_____

You should think about investing as you have time for the market to recover.

Long Goal (7+ years)

Needs	Wants
 Retire on £_____	 Go on a cruise £_____
 Save for children's education £_____	 Buy a holiday home £_____

You should think about investing as you have time for the market to recover.

Your money goals

Short Goal (1-3 years)

Needs	Wants

Medium Goal (4-6 years)

Needs	Wants

Long Goal (7+ years)

Needs	Wants