

Financial Wellness @ DU

Brennan School of Business



Financial Goals Sheet

S.M.A.R.T Goals Are: Specific, Measurable, Attainable, Realistic, Time Specific

To plan your financial goals you should use S.M.A.R.T Goals to help you better plan and achieve those goals. In the sheet below you can begin planning your goals. We have provided an example below to help you get started.

Goal	Cost – Frequency	Plan	Expected Time of Goal Finalization
EXAMPLE: Save \$3,000 to purchase a car	\$3,000 \$250 monthly	Automate \$250 from checking to savings account each month	December 2022