FolarraStudio

# Financial Goals Planner

*dream · plan · reach*

UNDATED · PRINTABLE · TRACKERS, GOALS & REVIEW

# This Planner Belongs To

*for anyone getting organized with money*

NAME _____

STARTED ON _____

GOAL _____

BUDGET _____

REVIEW DAY _____

## How to use this planner

- Print the whole planner once, then print extra copies of the pages you use most, such as the Vision and Goals pages.
- Print at 100% / Actual size on A4 or US Letter paper. The printable pages have a white background to save ink.
- Hole-punch the pages and keep them in a binder, so you can add pages any time.
- Every page is undated, so you can start in any month of any year.
- Write each goal with a date and amount, then color in progress every month.
- Digital planner: open the hyperlinked PDF in any PDF annotation app and tap the tabs to jump between sections.

## My money word

## Why I am doing this

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# Money Vision

*what money is for*

## One year

## Five years

## What matters most

## What I will stop spending on

# Goals List

*with dates and amounts*

| GOAL | AMOUNT | BY | PER MONTH | DONE |
|---|---|---|---|---|
| | | | | ☐ |
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# Goal Plan

*one goal per page*

GOAL _____ AMOUNT _____

START _____ DEADLINE _____

## Why it matters

## Steps

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

## Obstacles & fixes

# Progress Tracker

*color as you save*

GOAL _____ EACH CIRCLE = _____

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 | 39 | 40 |
| 41 | 42 | 43 | 44 | 45 | 46 | 47 | 48 | 49 | 50 |
| 51 | 52 | 53 | 54 | 55 | 56 | 57 | 58 | 59 | 60 |
| 61 | 62 | 63 | 64 | 65 | 66 | 67 | 68 | 69 | 70 |
| 71 | 72 | 73 | 74 | 75 | 76 | 77 | 78 | 79 | 80 |
| 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 | 89 | 90 |
| 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99 | 100 |

# Net Worth Tracker

*by month*

YEAR _____ GOAL _____

| MONTH | HAVE | OWE | NET WORTH |
|---|---|---|---|
| Jan | | | |
| Feb | | | |
| Mar | | | |
| Apr | | | |
| May | | | |
| Jun | | | |
| Jul | | | |
| Aug | | | |
| Sep | | | |
| Oct | | | |
| Nov | | | |
| Dec | | | |
| Total | | | |

# Quarterly Review

*stay on course*

## Progress

## Wins

## Changes

## Next quarter

# Notes



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# Thank you!

Thank you for choosing FolarraStudio. I hope this planner makes everyday life a little calmer and more organized. If you enjoy it, tell a friend about folarrastudio.com.

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