

My financial plan

Activity sheet



Choose some life goals and plan when you will be able to achieve them, based on your finances in the next year.

Estimate how much money you currently have to put towards your goals each month: £ _____

Think about:

- Short-term goals (ST) that you hope to achieve within six months
- Medium-term goals (MT) that you hope to achieve within one year
- Long-term goals (LT) that you hope to achieve in five years or longer

Goal	Cost (£)	ST / MT / LT	Number of months to save	Monthly saving (£)	Weekly saving (£)

Calculate the total that you would need to save each month to reach your goals: £ _____

Do you think that you will be able to afford this?

If not, consider:

- Can you extend the time on any goals to reduce monthly saving?
- Can you adapt any goals (e.g. a weekend break instead of a week's holiday)?
- Is there a goal that you can postpone?