

FINANCIAL VISION AND FAITH GOALS

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Form may be used for 1 year or longer - you decide for each goal.

Name(s): _____

Date: _____

**Target Dates may vary for each goal.

BIBLICAL GIVING GOALS

Target Period: _____

To pay the 10% tithe plus give & sow _____% of our increase for offerings & alms.

To make additional gifts each year of _____ to _____.

First Action Step:

First Action Step By (Month & Year):

SAVING GOALS

Target Period: _____

Type of Savings Account

Amount

Annual Return

Date

(Do Not Include Investments)

_____	\$ _____	_____ %	_____
_____	\$ _____	_____ %	_____
_____	\$ _____	_____ %	_____
TOTAL:	\$ _____	_____ %	_____

First Action Step:

First Action Step By (Month & Year):

EDUCATION FUND GOALS

Target Period: _____

A college or special education fund will exist for each of our children/grandchildren:

Child	Type of College	Approximate Annual Cost	Approximate Total Cost	Goal Amount
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

First Action Step:

First Action Step By (Month & Year):

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DEBT REPAYMENT GOALS

Target Period: _____

To have paid off the following debts:

<i>Creditors</i>	<i>Total Owed</i>	<i>Target Pay-Off Date</i>
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

First Action Step:

First Action Step By (Month & Year):

MAJOR PURCHASES

Target Period: _____

To have paid cash for the following major purchases/expenditures: (new home, car, vacations, etc.)

<i>Purchase/Expenditure</i>	<i>Goal Amount</i>	<i>Target Date</i>
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____

First Action Step:

First Action Step By (Month & Year):

LIFESTYLE GOALS

Target Period: _____

For the next _____ years, to:

- Check One:**
- _____ Maintain Present Level (Giving, Saving & Spending).
 - _____ Enlarge Spending Plan (Giving, Saving & Spending).
 - _____ Cut Back on Lifestyle and Spending Plan.

Strategy/Plan to achieve the lifestyle goal checked above:

First Action Step:

First Action Step By (Month & Year):

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START A BUSINESS

Target Period: _____

To start a business which will require an approximate investment of: \$ _____

Business Description: _____

First Action Step:

First Action Step By (Month & Year):

INVESTMENT GOALS

Target Period: _____

To have the following investments (stocks, bonds, mutual funds, real estate, savings, etc.):

<i>Type of Investment</i>	<i>Amount</i>	<i>Annual Return</i>	<i>Date</i>
_____	\$ _____	_____ %	_____
_____	\$ _____	_____ %	_____
_____	\$ _____	_____ %	_____
_____	\$ _____	_____ %	_____
_____	\$ _____	_____ %	_____
_____	\$ _____	_____ %	_____
_____	\$ _____	_____ %	_____
	TOTAL: \$ _____	_____ %	_____

First Action Step:

First Action Step By (Month & Year):

OTHER GOALS

Target Period: _____

(List, explain & estimate values if applicable)

First Action Step:

First Action Step By (Month & Year):

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ESTATE PLANNING:

Target Period: _____

To pass on the following estate (describe basics):

First Action Step:

First Action Step By (month & year):

CONGRATULATIONS:

Once godly goals are established, you are ahead of 95% of the people in the world.

The very next step is to begin taking your First Action Steps to accomplish the goals that God has given you. These may be very small steps. For example, a savings plan goal may start by you opening a savings account with a \$5 deposit. It may seem small, but in reality it is a huge action step -- so don't delay.

MOVE IN FAITH:

You need to move in faith. You prayed and set these goals knowing that God has a wonderful plan for you (Jeremiah 29:11). God has the resources. You need to supply the faith and the diligence to be a good and faithful steward. Then let God be God. He is your pilot and your provider.

REVIEW/REVISE ANNUALLY:

Make a commitment to review your goals at least once a year, maybe at the start of the New Year. Thank God for progress and for breakthroughs! Set new goals, or revise; these are YOUR goals.



Married Couples: Be sure to do your goal setting, and goals review, as a one flesh couple.



SINGLES: Seek a godly, trusted accountability partner.