

THE BUDGETNISTA & ELLEVEST

Goal Sheet

How to use this goal sheet

Dream Catcher, what are your investment goals? How much should you invest, how often and for how long? Will you invest for freedom, retirement or supplemental income? Take a moment to examine your finances and use the space below to declare your investment goals.

Investing Goals

Dream Catcher, remember that these goals should be declarations of intention. Be specific, be realistic, set a deadline! I've included examples of both a fragile and a strong goal. My hope is that you will create (3) strong investment goals.

Goal Examples:

Fragile - I want to start investing.

Strong - I want to open an investment account and fund it with \$500 by the end of this quarter.

Goal #1

Completion Date: _____

Goal #2

Completion Date: _____

Goal #3

Completion Date: _____

I, _____, pledge to work toward achieving the above goals, beginning with The Beginner Investor course, presented by The Budgetnista and Ellevest.

The Budgetnista



InvestLikeWomen.com



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