

# Financial Goals & Bucket List

Dream Big, Plan Smart, Take Action

**FOR YOUR RECORDS ONLY**

## YOUR FINANCIAL VISION

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*"A goal without a plan is just a wish."*

### GOAL #1

Goal:

Purpose:

Amount: \$  Target Date:

Action Steps:

- Step 1:
- Step 2:

### GOAL #4

Goal:

Purpose:

Amount: \$  Target Date:

Action Steps:

- Step 1:
- Step 2:

### GOAL #2

Goal:

Purpose:

Amount: \$  Target Date:

Action Steps:

- Step 1:
- Step 2:

### GOAL #5

Goal:

Purpose:

Amount: \$  Target Date:

Action Steps:

- Step 1:
- Step 2:

### GOAL #3

Goal:

Purpose:

Amount: \$  Target Date:

Action Steps:

- Step 1:
- Step 2:

### GOAL #6

Goal:

Purpose:

Amount: \$  Target Date:

Action Steps:

- Step 1:
- Step 2:

## POPULAR BUCKET LIST IDEAS

### POPULAR LIST IDEAS:

Down payment for a home, Buy a car, Emergency fund, Education fund, Become debt-free, Take a dream vacation, Start a business, Maximize retirement fund, College fund, Create passive income, Fund for wedding, Plan for my Financial freedom number, Follow my passion, Travel the World, Be successful, help others, Volunteer at a food bank, Follow my hobbies.

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