**Financial Goal-Setting Tool**

Select and prioritize your top three **post-insolvency** financial goals and fill in the blanks with your personal goal information. If you cannot find three goals from the list which are important to you, create your own, but make sure they are SMART (Specific, Measurable, Achievable, Relevant, and Time-bound)!

**Bring your top three financial goals to your in-person counselling session. You will discuss your financial goals and set a plan to achieve them with your counsellor.**

**SMART Financial Goals**

| **Priority** | **Financial Goals** |
| --- | --- |
| Select priority level  | Open a bank account by select date. |
| Select priority level  | Set up a savings account by select date. |
| Select priority level | Set up automatic payments for insert expense by select date. |
| Select priority level | Set up an automatic monthly transfer of $ insert amount to my savings account by select date. |
| Select priority level | Select a record keeping method and begin tracking all my expenses on select date. |
| Select priority level | Increase my income by $ insert amount every select period through insert method of increasing income by select date. |
| Select priority level | Reduce insert expense every select period by $ insert amount by select date. |
| Select priority level | Save $ insert amount every select period so I have $ insert amount for insert financial goal by select date. |
| Select priority level | Save $ insert amount every select period so I have $ insert amount for insert financial goal by select date. |
| Select priority level | Save $ insert amount every select period so I have $ insert amount for insert financial goal by select date. |

**Create your own SMART Financial Goals**

| **Priority** | **Financial Goals** |
| --- | --- |
| Select priority level | insert financial goal by select date |
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