



## Assessment 1

# Where Am I Going?

### A Goal-Setting Exercise

To build wealth, you must establish goals. For each time frame, set one personal goal. Then set a financial goal that will allow you to meet the personal goal. For example, if you want to take a trip with friends this summer, how much will you need to save?

In preparing your goals:

- Be realistic.
- Establish time frames.
- Be flexible; goals can change.

### By the end of the school year ...

Personal goal \_\_\_\_\_

Financial goal \_\_\_\_\_

### By the end of summer ...

Personal goal \_\_\_\_\_

Financial goal \_\_\_\_\_

### In one year ...

Personal goal \_\_\_\_\_

Financial goal \_\_\_\_\_

### SMART Goal

Choose one goal above and write it as a SMART goal:

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