

Determining Your Goals

My Educational Goals are:

1. _____
Goal Length Type: Short-term Mid-term Long-term

2. _____
Goal Length Type: Short-term Mid-term Long-term

3. _____
Goal Length Type: Short-term Mid-term Long-term

My Social Goals are:

1. _____
Goal Length Type: Short-term Mid-term Long-term

2. _____
Goal Length Type: Short-term Mid-term Long-term

3. _____
Goal Length Type: Short-term Mid-term Long-term

My Financial Goals are:

1. _____
Goal Length Type: Short-term Mid-term Long-term

2. _____
Goal Length Type: Short-term Mid-term Long-term

3. _____
Goal Length Type: Short-term Mid-term Long-term

Note: Short-term = 1-4 weeks, Mid-term = 2-12 months, Long-term = 1 year or longer

Prioritize and Develop Your Goals

Goal #1: _____

Research What's Needed for Achieving this Goal:

Goal Budget is: \$ _____ When do I need to achieve this goal by: _____

Action to be taken: _____

Goal #2: _____

Research What's Needed for Achieving this Goal:

Goal Budget is: \$ _____ When do I need to achieve this goal by: _____

Action to be taken: _____

Goal #3: _____

Research What's Needed for Achieving this Goal:

Goal Budget is: \$ _____ When do I need to achieve this goal by: _____

Action to be taken: _____

Where does your money come from?

Income	Budget (Monthly)	Actual	Difference
<i>Job #1</i>	\$	\$	\$
<i>Job #2</i>	\$	\$	\$
<i>Work Study</i>	\$	\$	\$
<i>Other</i>	\$	\$	\$
Total monthly income	\$	\$	\$

Financial Aid	Budget (Annual)	Actual	Difference
<i>Pell Grant</i>	\$	\$	\$
<i>SEOG</i>	\$	\$	\$
<i>Cal Grant</i>	\$	\$	\$
<i>Student Success C. Grant</i>	\$	\$	\$
<i>Student Loans</i>	\$	\$	\$
<i>Parent PLUS</i>	\$	\$	\$
<i>Scholarships</i>	\$	\$	\$
<i>CHAFEE Grant</i>	\$	\$	\$
<i>BIA Grant</i>	\$	\$	\$
<i>CARES Grant</i>	\$	\$	\$
<i>TRIO Grant</i>	\$	\$	\$
<i>Other</i>	\$	\$	\$
Total Annual Aid	\$	\$	\$
<i>(Divide by 12)</i>	/12	/12	/12
Total Monthly Aid	\$	\$	\$

Income & Aid	Monthly Budget	Actual	Difference
<i>Income</i>	\$	\$	\$
<i>Aid</i>	\$	\$	\$
Total Monthly Resources	\$	\$	\$

Where does your money go?

Fixed Regular Expenses	Monthly Budget	Actual	Difference
Rent/Mortgage	\$	\$	\$
Car insurance	\$	\$	\$
Car Payment	\$	\$	\$
Other Insurance	\$	\$	\$
Other: _____	\$	\$	\$
Other: _____	\$	\$	\$
Total Monthly Fixed	\$	\$	\$

Fixed Irregular Expenses	Monthly Budget	Actual	Difference
Food	\$	\$	\$
Utilities	\$	\$	\$
Cell Phone	\$	\$	\$
Credit Card Payment	\$	\$	\$
Savings	\$	\$	\$
Transportation	\$	\$	\$
Bus Fare	\$	\$	\$
Gas and maintenance	\$	\$	\$
Repairs	\$	\$	\$
Medical Expenses	\$	\$	\$
Clothing	\$	\$	\$
Entertainment	\$	\$	\$
Household Items	\$	\$	\$
Personal Items	\$	\$	\$
Tuition	\$	\$	\$
School Expenses	\$	\$	\$
Other: _____	\$	\$	\$
Total Monthly Irregular	\$	\$	\$

Flexible Expenses	Monthly Budget	Actual	Difference
Streaming Services	\$	\$	\$
Eating Out	\$	\$	\$
Other: _____	\$	\$	\$
Total Monthly Flexible	\$	\$	\$

Mad Money	Monthly Budget	Actual	Difference
Unspecified	\$	\$	\$
Total Monthly Mad Mon.	\$	\$	\$

Total Expenses	Monthly Budget	Actual	Difference
Fixed	\$	\$	\$
Irregular	\$	\$	\$
Flexible	\$	\$	\$
Mad Money	\$	\$	\$
Total Monthly Expenses	\$	\$	\$

Discretionary Income

Total Monthly income – Total monthly Expenses =

Discretionary: Budget: \$ _____

Goal Analysis

Goal #1: Required Budget: _____ Action to be taken: \$ _____ Per Month Until: _____

Goal # 2: Required Budget: _____ Action to be taken: \$ _____ Per Month Until: _____

Goal #3: Required Budget: _____ Action to be taken: \$ _____ Per Month Until: _____

Monthly discretionary: _____ Required monthly action: _____ Remaining budget: _____

Goals can be met: Yes No

Goals need to be revised: Yes No