

SMART Goals Worksheets

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My name is Lotasha Thomas and I am the "soloprenuer" of My Finances Matter. I strive to teach young (and old) people about personal finance and help them to build a solid foundation in which they can make informed financial decisions. In 2018, I earned my Master of Business Administration. I am a licensed Certified Public Accountant (CPA) and have 15+ years in the tax, finance, personal finance and non-profit accounting industries. I am currently a Controller for a local non-profit organization. While I like working with adults, my passion is opening the eyes of young adults and teenagers to the world of financial literacy. Money will always exist. We will always need it and use it. With that being said, we need to know how to manage it properly.

Thank you for downloading, "Setting SMART Goals". The worksheets are easy to use and I encourage you to print them out and use them for all of your goal setting. The Goal Tracker is for your overall goal, while the task tracker can be used for individual tasks related to the larger goal. Please visit our website, www.myfinancesmatter.com for additional financial tools.

Setting SMART Goals

When setting goals, it's so important to be as specific as possible. For example, the goal "I want to save money" won't cut it. How are you going to accomplish the goal? When would you like to have the goal completed by? The answer is to create SMART goals!

S - Specific: State exactly what you will do!

M - Measurable: Provide a way to evaluate. Use metrics & data targets.

A - Achievable: It must be possible to accomplish.

R - Relevant or Realistic: Be honest with yourself and make sure it makes sense. Your goal must align with your overall mission.

T - Time Bound: Give yourself a deadline or time frame to get it done.

In the generic example above, using the SMART method, your goal could be "I want to save \$5,000 by November 1st by reducing my personal expenses 20% and increasing my monthly income 25% by creating a new side hustle." Use the next pages to map out and track your goals and tasks.

Goal Setting

S Specific

M Measurable

A Attainable

R Realistic

T Time Bound

My Goals

Start Date:

Target Completion Date:

Specific: What exactly will you accomplish?

Measurable: Track your progress and outcomes.

Achievable: Do you have the tools to achieve your goals?

Relevant/Realistic: Does your goal align with your life's mission?

Time Bound: How long will it take you to complete?

My Task Tracker

Start Date:

Completion Date:

Task: What I need to do to achieve it?

Measure of Success: How will I know if I was successful?

Resources: What do I need to complete the task?

Time Period: When is my deadline to complete the task?

Follow up: If the task was completed, note here. If not complete, why?