

Financial Goals Brainstorming & Prioritization Worksheet

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Welcome! This is your space to dream big and bring clarity to your financial future. Don't worry about 'how' just yet - just focus on 'what'. Use this worksheet to turn those dreams into an actionable plan!

Part 1: The Great Brain Dump

Write down everything you'd like to achieve with your money in the spaces below. No goal is too big or too small!

Home & Family (e.g., house deposit, new kitchen, wedding, children's savings)

Travel & Lifestyle (e.g., trip to Italy, new car, hobby equipment)

Career & Education (e.g., professional course, start a business, sabbatical)

Financial Security (e.g., pay off credit card, build emergency fund, invest £100/month)

Part 2: Making Your Top 3 Goals SMART

Now, pick your top three goals from the list above and let's turn them from vague wishes into concrete plans using the SMART framework.

Goal #1: _____
Specific (What is it exactly?): _____
Measurable (How much do I need?): £ _____
Achievable (Is this realistic for me?): _____
Relevant (Why is this important to me?): _____
Time-bound (What is my deadline?): _____

Goal #2: _____
Specific (What is it exactly?): _____
Measurable (How much do I need?): £ _____
Achievable (Is this realistic for me?): _____
Relevant (Why is this important to me?): _____
Time-bound (What is my deadline?): _____

Goal #3: _____
Specific (What is it exactly?): _____
Measurable (How much do I need?): £ _____
Achievable (Is this realistic for me?): _____
Relevant (Why is this important to me?): _____
Time-bound (What is my deadline?): _____

Part 3: The Prioritization Matrix

Time to decide what comes first. List your SMART goals below. For Importance and Urgency, give a score from **1 (low) to 5 (high)**. Multiply them to get your Priority Score. The highest score is your top priority!

My SMART Goal	Time Horizon (Short / Mid / Long)	Importance (1-5)	Urgency (1-5)	Priority Score (Imp. x Urg.)
<i>e.g., Save £1k Emergency Fund</i>	<i>Short</i>	<i>5</i>	<i>5</i>	<i>25</i>
<i>e.g., Save £15k House Deposit</i>	<i>Mid</i>	<i>5</i>	<i>3</i>	<i>15</i>

e.g., Save £1.2k Holiday	Short	3	4	12

Part 4: My Action Plan

You've found your priority! Let's make it real. Fill in the blanks below to create your automated action plan.

My **#1 Priority Goal** is:

The **Total Amount** I need is: £ _____

My **Timeframe** in months is: _____

My Calculation: Total Amount / Time in Months = **My Monthly Savings Target**

£ _____ / _____ months = £ _____ per month

My Commitment:

I will set up a standing order for this amount to a dedicated savings account the day after my next payday.

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