

Goal clarity worksheet



Define Your Money Targets. Focus Your Actions.

Goal Mapping Sheet

Clarity is power.

This worksheet helps you pinpoint one short-term financial goal, break it into actionable steps, and start seeing progress immediately.

(For long-term planning, habit-building, and full goal alignment, the complete Money Systems bundle takes you all the way.)

Pick Your Goal

What is your main financial goal right now?

Examples:

Save \$500 this month

Pay off credit card

Build emergency fund starter

Start investing

My Goal:

Define the Numbers

Target Amount:

Deadline / Timeline:

Action Plan

List 2–3 actions you can take this month to reach your goal:

Motivation Check

Why do you want this goal?

How will it improve your life?

Quick Reflection!

At the end of the month:

Did I take consistent action?

Did I hit my mini milestones?

What worked? What can I improve?

Attaching emotion to numbers makes reaching goals easier.

After gaining clarity, I suggest incorporating more financial systems into your life that delve into psychology, identity transformation, and a proactive financial mindset.

Being a little shameless, if you're looking for structured reflections, weekly check-ins, and long-term goal alignment, all of that is included in my paid

Money Systems!