

S.M.A.R.T. GOALS WORKSHEET



PARADIGM
WEALTH PARTNERS

Name: _____

Date: _____

Add your goal to the following worksheet, then use the SMART process to determine the characteristics of your objective(s). SMART stands for specific, measurable, achievable, relevant, and time-bound.

EXAMPLES:

- I want to save \$2,500,000 for retirement by time I'm 65.
- I want to pay off all of my credit card debt by December 31, 2020.

Short Term Goal	
SPECIFIC: Who? What? When? Where? Why? Which?	
MEASURABLE: Metrics and Milestones. How much? What percentage?	
ACHIEVABLE: Do you have skills and tools? to accomplish this objective?	
RELEVANT: Does it fit with overall financial/family objectives?	
TIME-BOUND: Deadline	

Intermediate Term Goal	
SPECIFIC: Who? What? When? Where? Why? Which?	
MEASURABLE: Metrics and Milestones. How much? What percentage?	
ACHIEVABLE: Do you have skills and tools? to accomplish this objective?	
RELEVANT: Does it fit with overall financial/family objectives?	
TIME-BOUND: Deadline	

Long Term Goal	
SPECIFIC: Who? What? When? Where? Why? Which?	
MEASURABLE: Metrics and Milestones. How much? What percentage?	
ACHIEVABLE: Do you have skills and tools? to accomplish this objective?	
RELEVANT: Does it fit with overall financial/family objectives?	
TIME-BOUND: Deadline	

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