

## SETTING FINANCIAL GOALS

Goal number	<u>Short term goals</u>	Date to reach goal	\$ Saved to date	Plan
1	Pay off \$500 credit card balance	15-Apr-13	0	Pay \$50 above minimum balance each month until bal. = 0
	<u>Medium term goals</u>			
1	Pay off student loans	12/31/2016	0	pay bal. due each month; use 50% of tax refund to pay it down
	<u>Long term goals</u>			
1	Save for retirement	retire at 40	\$4,500	maximize 401-K; purchase company stock

Dawn C. Funderbirk