

## 2027 Financial Goal-Setting Worksheet

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Run the three tools below first, then fill in this sheet. Turning 'save more' into one specific number is the single most useful thing you can do this January.

My net worth right now (from the Net Worth Calculator): PHP \_\_\_\_\_

My emergency fund: currently covers \_\_\_\_\_ months of expenses

My retirement gap (from the Retirement Planner): PHP \_\_\_\_\_

### THIS YEAR'S ONE FINANCIAL GOAL:

\_\_\_\_\_

\_\_\_\_\_

Target amount: PHP \_\_\_\_\_ Target date: \_\_\_\_\_

Monthly amount needed: PHP \_\_\_\_\_

Per-payday amount (if paid twice a month): PHP \_\_\_\_\_

How I'll automate this (bank, app, standing instruction): \_\_\_\_\_

### Good to know:

- Pick ONE goal. Keep small automatic contributions to other goals, but this is your main focus.
- Set up the automatic transfer this week - don't rely on willpower for the next 12 months.
- Revisit this sheet every 3 months. Progress doesn't have to be dramatic to be real.

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### Want to help people turn wishes into plans?

Scan the QR code or visit [inspirallife.ph/become-an-advisor](https://inspirallife.ph/become-an-advisor) to learn how to become a licensed financial advisor in the Philippines.



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