



Petal & Paper

YOUR FREE PRINTABLE

Annual financial goals planner



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FINANCIAL GOALS

year planner

Goal 1 (emergency / savings) · Target: £____ Current: £____
Monthly add: £____

6-month check · Balance: £____ On track: ☐ Adjust: ____

Goal 2 (debt clearance) · Target: clear £____ by ____ Monthly
overpay: £____

6-month check · Remaining: £____ On track: ☐ Months saved:

Goal 3 (pension/invest) · Contribution: £____/month Balance
target: £____

Year-end review · Goal 1: ☐ Goal 2: ☐ Goal 3: ☐

Net worth change · Start: £____ End: £____ Change: +/- £____

ONE FINANCIAL YEAR · THREE GOALS ·
MONTHLY ACTION

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