Your savings goal, made practical.

One goal. A realistic contribution plan. Progress you can see.

HOW TO USE THIS SMART PDF

Enter white fields; calculated boxes update in Adobe Acrobat Reader. Print if you prefer paper.

01 DEFINE ONE GOAL

WHAT ARE YOU SAVING FOR?

TARGET DATE (OPTIONAL)

WHY IS THIS GOAL IMPORTANT?

02 SET A REALISTIC SAVINGS PLAN

GOAL AMOUNT ($)

SAVED WHEN STARTING ($)

MONTHS UNTIL GOAL

I CAN SAVE EACH MONTH ($)

UPDATE YOUR MONTHS REMAINING as time passes. This keeps the catch-up amount accurate.

03 YOUR LIVE NUMBERS

CURRENT SAVED

STILL TO SAVE

GOAL FUNDED

MONTHLY REQUIRED

WEEKLY REQUIRED

MONTHLY GAP

STATUS BASED ON YOUR PLANNED MONTHLY DEPOSIT

PROJECTED SAVINGS AT DEADLINE

Monthly gap = additional monthly savings needed beyond what you plan to contribute.

Track a goal. Adjust the plan.

Enter one total added and one total withdrawn per month - not individual transactions.

USE THIS AS A MONTHLY CHECK-IN

Start with the amount already saved on page 1. Fill any month; calculations update on both pages.

04 TWELVE MONTHLY CHECK-INS

MONTH		ADDED ($)	USED ($)	BALANCE ($)	FUNDED (%)
01					
02					
03					
04					
05					
06					
07					
08					
09					
10					
11					
12					

05 NEXT STEP

ONE ACTION TO MAKE THE NEXT CONTRIBUTION EASIER

This planner tracks one goal; it is not a bank ledger or household spending system.