

## Adult Mental Health Division Representative Payee Program

## Individual Savings Goal Worksheet

This exercise is designed to help you to start thinking about setting some financial goals. Please write down three short-term goals (things that you can save enough money for in twelve months or less), three long-term goals (things that you can save enough money for in more than one year but less than five), and the approximate cost of each goal item. Make sure that your goals are realistic and attainable.

Short-term goals		Long-term goals			
ltem	Approx. Cost	it	rem	Approx.	
Circle the most important iten month in order to purchase th	n in each list a ese items. Se	nd estimate how t a plan and a ta	/ much you need	to save each	
For my short-term goal, I will stem on I months. I will purchase	For my long-te	erm goal. I will sa	ave Ś m	ll purchase th onthly for	
Consumer's Name	Signature			 Date	
Case Manaġer's Name	CM Signature		Renresenta	Renresentative Pavee	

CM<sup>'</sup>Signature

Representative Payee