

LDW Tax & Accounting Services

Financial Goal Planner

Building wealth and financial stability starts with clear goals and consistent action. Use this planner from LDW Tax & Accounting Services to set, track, and celebrate your financial milestones — whether you're saving for a major purchase, building your business, or planning for the future.

Step 1: Define Your Financial Goals

Write down 3–5 specific goals you want to achieve this year. Include the purpose, target amount, and target date for each.

Goal	Purpose	Target Amount (\$)	Target Date	Progress Notes

Step 2: Create Your Monthly Action Plan

Break your goals into small, achievable steps. Record monthly actions to stay consistent and measure your progress.

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Step 3: Reflect & Reset

Review your progress at the end of each quarter. Celebrate your wins and adjust your strategy where needed.

Quarter	What Went Well	What I'll Improve	New Goals

■ **LDW Tip:** Review your goals monthly and adjust as needed. Consistency creates results — and LDW Tax & Accounting Services is here to help you stay on track!

Contact Us:

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