KINGDOM FAMILY MINISTRY
Stronger Families. Stronger Communities.

1-Year Financial Goal Planner

Financial Goal Planner & Debt Freedom Toolkit

Why 1 year? A 1-year goal is big enough to create real change — pay off significant debt, build solid savings, or shift your financial trajectory entirely.
Break it into quarterly checkpoints so you can stay on course and adjust along the way.

Name: ____________ **Year:** ____________ **Start Date:** ____________ **End Date:** ____________

My Vision — Where do I want to be financially one year from now?

____

____

My 1-Year Financial Goals

Goal 1 — Emergency Fund / Savings

My goal: ____________ **Target $:** ____________

Quarterly milestones:

Q1 (Month 1–3)	Q2 (Month 4–6)	Q3 (Month 7–9)	Q4 (Month 10–12)

How I will reach it: ____________ **Completion date:** ____________

Goal 2 — Debt Elimination

My goal: ____________ **Target $:** ____________

Quarterly milestones:

Q1 (Month 1–3)	Q2 (Month 4–6)	Q3 (Month 7–9)	Q4 (Month 10–12)

How I will reach it: ____________ **Completion date:** ____________

Goal 3 — Budgeting & Spending

My goal: ____________ **Target $:** ____________

Quarterly milestones:

Q1 (Month 1–3)	Q2 (Month 4–6)	Q3 (Month 7–9)	Q4 (Month 10–12)

How I will reach it: ____________ **Completion date:** ____________

Goal 4 — Income & Career Growth

My goal: ____________ **Target $:** ____________

Quarterly milestones:

Q1 (Month 1–3)	Q2 (Month 4–6)	Q3 (Month 7–9)	Q4 (Month 10–12)

How I will reach it: ____________ **Completion date:** ____________

Goal 5 — Credit & Financial Health

My goal: ____________ **Target $:** ____________

Quarterly milestones:

Q1 (Month 1–3)	Q2 (Month 4–6)	Q3 (Month 7–9)	Q4 (Month 10–12)

How I will reach it: ____________ **Completion date:** ____________

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Quarterly Progress Tracker

Quarter	Goal 1 Saving	Goal 2 Debt	Goal 3 Spending	Goal 4 Income	Goal 5 Credit	Notes / Wins
Q1 Months 1–3	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	
Q2 Months 4–6	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	
Q3 Months 7–9	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	
Q4 Months 10–12	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	☐ On track $ ____ Notes: ____	

Mid-Year Check-In (Complete after Month 6)

Am I on pace?

What needs to change?

New obstacles?

End-of-Year Review

Which goals did I fully achieve this year?

Which goals did I partially achieve — and why?

What is the single biggest financial lesson I learned this year?

What is my #1 financial priority for next year?

1-Year Goal Completion Summary

Goal 1 — Saving	Goal 2 — Debt	Goal 3 — Spending	Goal 4 — Income	Goal 5 — Credit
☐ Done ☐ Partial ☐ Missed	☐ Done ☐ Partial ☐ Missed	☐ Done ☐ Partial ☐ Missed	☐ Done ☐ Partial ☐ Missed	☐ Done ☐ Partial ☐ Missed

"The plans of the diligent lead to profit as surely as haste leads to poverty."

— Proverbs 21:5