Financial Vision Board

How to use this template

Choose up to 3 financial goals that matter to you. Add a visual reminder, fill in the details and choose one small action for each goal.

Goal 1

What am I working towards?



Use a photo, symbol, word or colour that represents this goal.

Why does this matter to me?

Target amount

Target date

Progress so far

What's one small step I can take to move closer to this goal?

Goal 2

What am I working towards?

Use a photo, symbol, word or colour that represents this goal.

Why does this matter to me?

Target amount

Target date

Progress so far

What's one small step I can take to move closer to this goal?

Goal 3

What am I working towards?

Use a photo, symbol, word or colour that represents this goal.

Why does this matter to me?

Target amount

Target date

Progress so far

What's one small step I can take to move closer to this goal?

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