

# Financial Goal-Setting Letter

Date: [Insert Date]

To: [Recipient's Name]

From: [Your Name]

## Subject: Financial Goal-Setting Plan

Dear [Recipient's Name],

I hope this message finds you well. As we embark on planning for our financial future, I wanted to outline a framework for setting our financial goals for the coming year:

### 1. Define Your Financial Goals

- Short-term goals (0-1 year)
- Medium-term goals (1-5 years)
- Long-term goals (5+ years)

### 2. Assess Your Current Financial Situation

Evaluate income, expenses, assets, and liabilities to get a clear picture of your financial status.

### 3. Set SMART Goals

Ensure goals are Specific, Measurable, Achievable, Relevant, and Time-bound.

### 4. Create an Action Plan

Outline steps and strategies to reach each goal.

### 5. Monitor and Adjust

Regularly review progress and make adjustments as needed.

By following this framework, we can create a structured approach to achieving our financial aspirations. Let's schedule a time to discuss this further.

Best regards,

[Your Name]

[Your Contact Information]