

Quick Reference Series

(800)727-3328 x4066

FinancialWellBeing@BroadviewFCU.com

S.M.A.R.T.E.R. Goals

The following process can help individuals set and achieve goals related to wants and needs.



Break goals down into monthly and weekly steps. Taking small, manageable steps makes them more achievable!

Goal	Target Date	Cost	Monthly Savings Needed	Weekly Savings Needed	Action Plan

Broadview Financial Well-Being learning content and activities are aligned to the applicable K-12 educational learning standards: The New York State Learning Standards: Career Development and Occupational Studies; The National Standards in K-12 Personal Finance Education; and The Common Core Learning Standards; or the applicable adult learning standards: Institute for Financial Literacy: National Standards for Adult Financial Literacy Education.

Broadview Financial Well-Being's mission is to guide and encourage individuals to focus on achieving economic stability — using innovative tools, making informed decisions, and encouraging positive habits. Broadview is the recipient of both the national and statewide 2018 Desjardins Youth Financial Education Award (more than \$1 billion asset category).

©2020 Broadview Financial Well-Being.