

First Initial & Last Name: _____

Birth Month/Day: _____ (ex. 9/16)

For security purposes, only fill out your first initial, last name, month and day you were born

SETTING A SMART GOAL

What is a SMART goal?

- S** = Specific What are you saving for?
- M** = Measurable How much do you want to save?
- A** = Attainable Is it realistic? Is it doable?
- R** = Relevant Is it worth saving for? Is this important to you?
- T** = Timebound When will you meet your goal?

Setting your own savings goals

Identify a short-term savings goal (something you'd like to save for this year)

Make your goal SMART

SMART goal elements	Related questions	Your SMART savings goals
S= Specific	What are you saving for?	
M= Measurable	How much do you want to save?	
A= Attainable	Is this realistic? Is this doable?	
R= Relevant	Is this worth saving for? Is this important to you?	
T= Timebound	When will you meet your goal?	

Create a savings target

Calculate how much you'll need to save each week to meet your savings goal.

Return via email to Whitney Landry at wlandry@bayportcu.org, drop off at any BayPort branch location, or mail to:

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