

2026

HERE to Help You Plan. HERE to See It Through.

Because your goals deserve a plan and a bank that knows you.



2026 Financial Goals Planner

At **Georgia First Bank**, we believe financial confidence isn't built overnight. It's built through thoughtful planning, steady habits, and the support of people who understand where you're coming from, and where you want to go.

This planner is designed to help you clarify what matters most in 2026, set realistic goals, and take simple steps toward long-term financial strength.

There's no perfect starting point. There's just *your* starting point, and we're here to help.

My 2026 Financial Focus

Before you set goals, take a moment to reflect.

What do you want your finances to *feel* like this year?

- More stable
- More organized
- Less stressful
- Growing with intention
- Ready for what's next

In one sentence, my primary financial focus for 2026 is:

My Top 3 Financial Goals for 2026

The most successful plans focus on a few clear priorities – not everything at once.

Use the space below to identify your three most important financial goals for the year ahead.

Goal	Why This Matters	Target Date	Monthly Action

My Financial Snapshot

Understanding where you are today helps you move forward with confidence.

Category	Where I Am Now	My 2026 Target
Emergency Savings		
Monthly Savings		
Outstanding Debt		
Credit Score		

Habits That Support My Goals

Small, consistent actions often make the biggest difference.

- Automate savings
- Review accounts monthly
- Pay myself first
- Reduce unnecessary spending
- Ask questions and seek guidance

Notes & Next Steps

Use this space to write reminders, questions, or ideas you'd like to explore with your banker.

Your goals may change – and that's okay. Revisiting them is part of the process.

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Pre-Retirement & Retirement (55+)

Protecting what you've built – and planning with confidence.

Planning for the Next Chapter

Whether retirement is approaching or already underway, this stage is about clarity, confidence, and protecting the life you've worked hard to build.

This planner helps you organize priorities and prepare for the years ahead.

Income & Lifestyle Planning

Primary Income Sources

- Retirement accounts
- Social Security
- Investments
- Other income

Annual Income Goal: _____

Preparing for What Matters Most

- Debt-free goals reviewed
- Healthcare planning considered
- Emergency savings in place
- Legacy or estate conversations started

Use this space to note questions or topics you'd like to discuss further:

Planning brings peace of mind – for you and those you care about