

My Financial Plan

Name: Class/Block Date:

A financial plan is your roadmap to your future. A roadmap that's detailed and accurate can help you get there with less trouble and less expense. A roadmap that's vague or inaccurate can lead you down rough roads and into dead ends. Fill in the blanks that apply to you with as much detail as you can. Take the time to research and check out anything you aren't sure of.

Before you start, you have to know where you want to end up.

My future career goal is to:

Tip: Remember, a financial plan is a living document – it changes as you do. Check it and revise it regularly to keep it up-to-date.

1. By the day I leave high school, what do I want to have done?

My education goal:

My work goal:

My savings goal:

My personal goals:

Tip: Write your goals so they're achievable, so they have a clear timeframe and so you know when you've accomplished them. E.g.:

- *My goal is to complete first year arts with a 75% average by spring 2011.*
- *My goal is to save \$5,500 in my college fund by the end of 2011.*
- *My goal is to work at Burger Joint when I graduate, and find a new job paying at least \$2,000 a month by March 2011.*

- *My goal is to establish a profitable small business selling T-shirts to students by September 2011.*
- *My goal is to save \$5,500 in my business start-up fund by the end of 2011.*
- *My goal is to save \$4,500 by the end of 2011 so I can travel.*