

DATE:

MONEY DATE WORKSHEET

ALIGN YOUR MONEY HABITS WITH YOUR GOALS

It is a good idea to prepare for this money date by logging into your bank account, credit card accounts etc. Alternatively, you can complete this money date worksheet right after you review your budget for the pay period.

LIST YOUR GOALS FOR THE NEXT 3 MONTHS:

CONSIDER WHAT YOU WANT TO MAKE HAPPEN BOTH PROFESSIONALLY AND PERSONALLY. TRY TO LIST 3 GOALS.



HOW IS YOUR MONEY HELPING YOU WITH THOSE GOALS RIGHT NOW?

AUTOMATED SAVINGS, EXTRA DEBT PAYMENTS, COMPLETING A COURSE, GETTING A COMPANY MATCH WITH YOUR 401(K) ETC.



WHAT ARE THREE ACTIONS YOU CAN TAKE TO MAKE YOUR MONEY WORK FOR YOUR GOALS?

