



# MONEYMOVEZ

COOK OR BE COOKED



## BUDGET



1. NAME: \_\_\_\_\_

2. AT THIS POINT IN YOUR LIFE, WHAT IS ON YOUR NEEDS AND WANTS LIST? LIST 4-5 POINTS.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**A GOOD BUDGET TELLS YOUR MONEY WHO'S THE BOSS...**

**LIST 4 KEY HABITS THAT EQUAL RESULTS.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**3. WHAT IS YOUR TEAM'S FINANCIAL GOAL?**

SHORT-TERM GOAL: \_\_\_\_\_

LONG-TERM GOAL: \_\_\_\_\_

**4. CREATE A MONTHLY BUDGET (USING THE 50/30/20 RULE)**

**BUILDING YOUR ZERO-BASED BUDGET**

**MONTHLY INCOME (ESTIMATE): \$\_\_\_\_\_**

NEEDS (50%): \$\_\_\_\_\_

WANTS (30%): \$\_\_\_\_\_

SAVINGS (20%): \$\_\_\_\_\_

**5. SAVING STRATEGY**

HOW MUCH WILL YOU SAVE EACH MONTH? \_\_\_\_\_

WHAT ARE YOU SAVING FOR? \_\_\_\_\_

**YOU INVEST \$200 INTO AN ACCOUNT EARNING 6% INTEREST PER YEAR.**

A) USE THE RULE OF 72 TO ESTIMATE HOW MANY YEARS IT WILL TAKE TO DOUBLE YOUR INVESTMENT.

\_\_\_\_\_

B) ABOUT HOW MUCH WILL YOUR INVESTMENT BE WORTH WHEN IT DOUBLES?

\_\_\_\_\_

C) IS 6% A FAST OR SLOW INTEREST RATE FOR GROWTH? EXPLAIN IN 1-2 SENTENCES.

\_\_\_\_\_





# MONEYMOVEZ

COOK OR BE COOKED



## BUDGET



### 6. HOW WILL YOU MAKE SMART MONEY MOVES?

- WHAT TOOLS/APPS WILL YOU USE TO TRACK YOUR BUDGET? \_\_\_\_\_
- HOW CAN YOU EARN EXTRA MONEY? \_\_\_\_\_
- WILL YOU INVEST, OPEN A SAVINGS ACCOUNT, OR START A SIDE HUSTLE? \_\_\_\_\_

### 7. PITCH YOUR PLAN!

WRITE YOUR 60-SECOND PITCH SUMMARY BELOW. BE READY TO SHARE HOW YOUR PLAN HELPS YOU MEET YOUR GOALS! \_\_\_\_\_

### 8. REFLECTION

WHAT WAS THE MOST IMPORTANT THING YOU LEARNED ABOUT MONEY TODAY?

---



---



---



---

