

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? _____

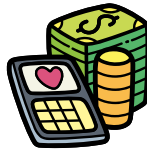
YOU INVEST \$200 INTO AN ACCOUNT EARNING 6% INTEREST PER YEAR.

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?

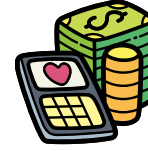
C) IS 6% A FAST OR SLOW INTEREST RATE FOR GROWTH? EXPLAIN IN 1-2 SENTENCES.





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6. HOW WILL YOU MAKE SMART MONEY MOVES?

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- 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? -----
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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?

