

MY FINANCIAL PLAN

THIS FINANCIAL TEMPLATE WILL HELP ME ORGANISE MY FINANCES AND MEET MY GOALS.

1) What do I want to do?

2) How much money do I need to achieve this goal? (research will be required)

A

3) What do I currently have?

ASSETS

My Savings

My Investments

My Other Assets

My Scholarships/Bursaries

My Students Loans (the money I'll get)

Other Education Savings Plans in my name

Contributions from family and friends

Other

My Total Assets - _____

B

DEBTS

My Credit Card balances

My students loans (the money I'll owe) -

My car loan -

My bank or other loans -

My other debts (money owed to family and friends) -

My Total Debts - _____

C

4) My net worth (total assets minus total debts) _____ **D = (B-C)**

5) Amount needed to reach my Goal _____ **E = (A-D)**

