



The Notebook

How to Use This Notebook

Section 7: Lesson 7

Target Practice

1. These worksheets will show your progress from month to month in three key areas. There are four copies of each of the three worksheets.
2. The *Next Step* pages will record your steps for changing your money dynamic. These next steps will become a permanent record of your commitment to being balanced and healthy.
3. Make extra copies as needed.
4. Don't feel overwhelmed, you don't need exact numbers, just enough so you can see the progress you are making.

The Money Dynamic
My Savings Worksheet

MONTH:

List all savings accounts	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$

Total Savings

List all investment accounts

Total Investments

List all retirement accounts

Total Retirement

TOTAL ALL SAVINGS

Answer these questions in your money notebook each month:

Is your savings growing?

Is there anything you want to change?

The Money Dynamic
My Savings Worksheet

MONTH:

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List all savings accounts	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$

Total Savings					
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List all investment accounts

Total Investments					
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List all retirement accounts

Total Retirement					
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TOTAL ALL SAVINGS					
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Answer these questions in your money notebook each month:

Is your savings growing?

Is there anything you want to change?

The Money Dynamic
My Savings Worksheet

MONTH:					
List all savings accounts	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$

The Money Dynamic
My Savings Worksheet

MONTH:					
List all savings accounts	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$

List all investment accounts					
Total Savings					

List all investment accounts					
List all retirement accounts					
Total Investments					

List all retirement accounts					
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TOTAL ALL SAVINGS					
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Answer these questions in your money notebook each month:

<i>Is your savings growing?</i>					
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Total Retirement					
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TOTAL ALL SAVINGS					
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Answer these questions in your money notebook each month:

<i>Is your savings growing?</i>					
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<i>Is there anything you want to change?</i>					
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The Money Dynamic
My Savings Worksheet

MONTH:

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List all savings accounts	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$

Total Savings					
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List all investment accounts

Total Investments					
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List all retirement accounts

Total Retirement					
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TOTAL ALL SAVINGS					
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Answer these questions in your money notebook each month:

Is your savings growing?

Is there anything you want to change?

The Money Dynamic
My Debt Worksheet

Month:					
List all credit card balances	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$
List all savings accounts	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$
Total Savings					
Total Credit Cards					
List all short-term loans					
(car, boat, etc.)					
Total Short-term					
List all long-term loans					
(student loan, home, etc.)					
List all retirement accounts					
Total Retirement					
Total Long-term					
TOTAL ALL SAVINGS					
Total All Debt					

Answer these questions each month in your money notebook:

Is your debt shrinking?

Is there anything you want to change?

The Money Dynamic
My Debt Worksheet

Month:

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List all credit card balances	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$

Total Credit Cards

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List all short-term loans

(car, boat, etc.)					

Total Short-term

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List all long-term loans

(student loan, home, etc.)					

Total Long-term

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Total All Debt

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Answer these questions each month in your money notebook:

Is your debt shrinking?

Is there anything you want to change?

The Money Dynamic
My Debt Worksheet

Month:

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List all credit card balances	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$

Total Credit Cards

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List all short-term loans					
(car, boat, etc.)					

Total Short-term

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List all long-term loans					
(student loan, home, etc.)					

Total Long-term

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Total All Debt

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Answer these questions each month in your money notebook:

Is your debt shrinking?

Is there anything you want to change?

The Money Dynamic
My Debt Worksheet

Month:

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List all credit card balances	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$

Total Credit Cards

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List all short-term loans					
(car, boat, etc.)					

Total Short-term

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List all long-term loans					
(student loan, home, etc.)					

Total Long-term

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Total All Debt

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Answer these questions each month in your money notebook:

Is your debt shrinking?

Is there anything you want to change?

MY NEXT STEPS



SPENDING PLAN



SAVINGS



DEBT

MY NEXT STEPS



SPENDING PLAN



SAVINGS



DEBT

MY NEXT STEPS



SPENDING PLAN



SAVINGS



DEBT

MY NEXT STEPS



SPENDING PLAN



SAVINGS



DEBT

