

Financial Planning: A Good Start! Activity

As you read the story, “Financial Planning: A Good Start!”, underline the appropriate parts of the story with colored pencils as they correlate with the questions and fill in the answers below.

1. Blue pencil - Where do Amelia and Joe work and how old are they?
2. Red pencil - How are financial difficulties causing marital tensions between Amelia and Joe?
3. Orange pencil - How many children do they want to have?
4. Green pencil – What advice did their parents give them?
5. Purple pencil - What are the three steps to develop their financial plan?
6. Yellow pencil - What are their personal assets?

Name _____ Period _____ Date _____

7. Brown pencil - What are their short-term goals?

8. Black pencil - What are their long-term goals?

9. How can Amelia and Joe best use their resources to achieve their goals?

10. What are three short-term financial goals you have?

11. What are three long-term financial goals you have?

12. It is important to have a financial plan because _____

