

Financial Wellness Worksheet

Los Paseos Aquatic Club

Name: _____

Budget Terms

Directions: Match each term to its definition by writing the correct letter in the space provided.

1. _____ a deposit account held at a financial institution. It is secure, easily accessible, and used to manage your money.
2. _____ money that is transferred or put into an account.
3. _____ money that is removed from an account.
4. _____ organization, like a credit union or bank, licensed to receive deposits, make loans, and offer financial services.
5. _____ a person designated and authorized to transact business on behalf of an account.
6. _____ place you can store money securely while typically earning interest.
7. _____ a security measure used by an account owner to gain access to their funds through an ATM or point-of-sale terminal.
8. _____ enables a person to perform basic banking activities like check their balance, withdraw cash, transfer funds, and deposit checks 24/7.
9. _____ payment card that deducts money directly from a person's checking account.

g. ATM
h. Savings account
i. Withdrawal

a. Debit card
b. Financial institution
c. Checking account

d. PIN
e. Account holder
f. Deposit

Wants Vs. Needs

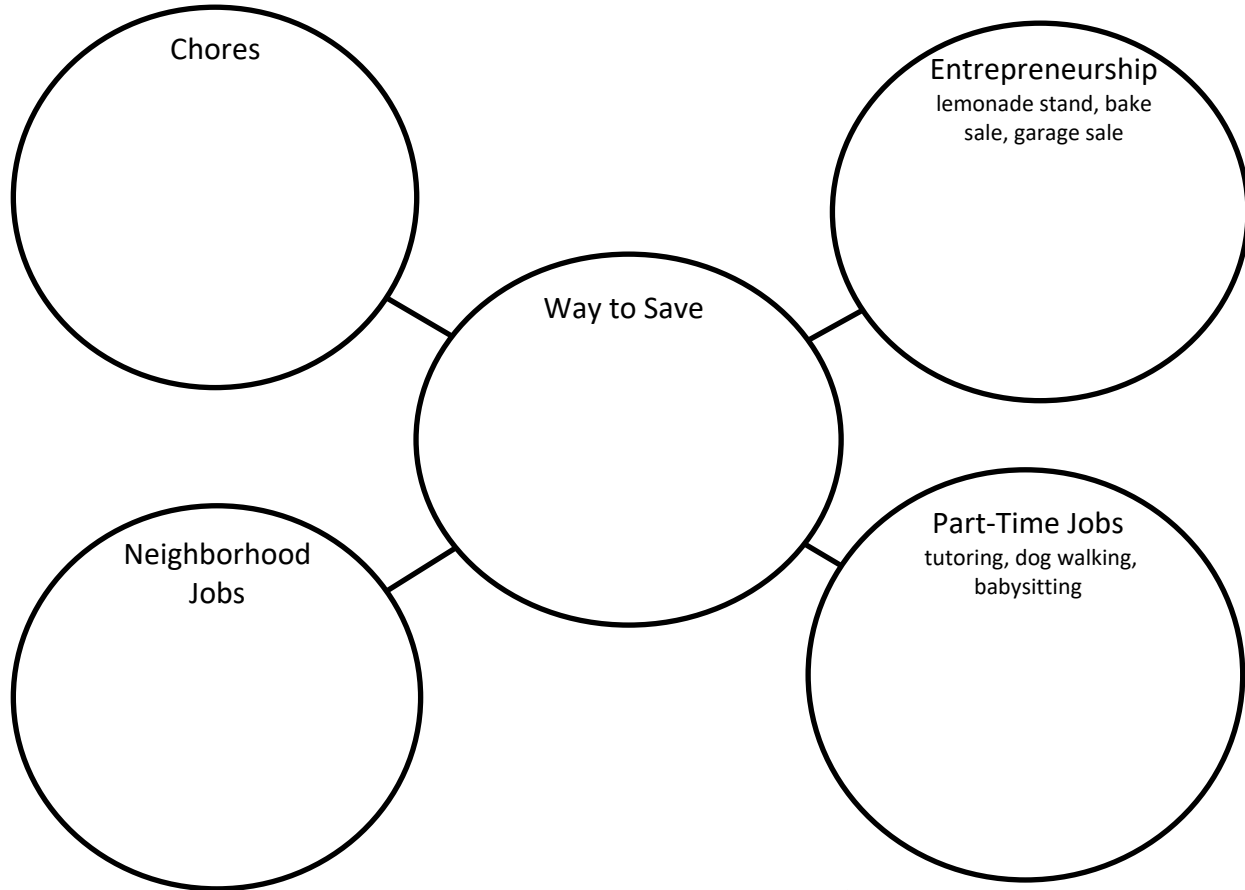


Write and draw something that you want.

Describe something that you need every day.

Let's Brainstorm!

Directions: Draw a possible job that you can do for each circle. For the middle circle, draw a way you can save your money!



My Saving Plan

My Goal: _____

The Cost: _____

Weekly Savings: _____

How Many Weeks: _____

Earn money for Los Paseos Aquatic Club (LPAC)! KeyPoint will **donate \$10** to LPAC if you complete this worksheet and bring it to **7030 Santa Teresa Blvd., Suite 10, San Jose, CA!**



KeyPoint will donate \$10 to the Los Paseos Aquatic Club for the first 150 Los Paseos Aquatic swim team members who complete the KeyPoint financial literacy worksheet and bring it in person to the KeyPoint branch at 7030 Santa Teresa Blvd., Suite 10, in San Jose, CA from June 24 through July 30, 2023. One donation per swim team member who submits a completed worksheet up to a maximum of 150 donations (\$1500 maximum donation). Worksheets must be delivered in person—no online or mailed submissions. Answers to worksheet questions will be available at the branch. Branch hours: Mon., Tues., & Thurs. 9 am-5 pm, Wed. 10 am-5 pm., Fri. 9 am-6 pm., and Sat. & Sun. 9:30 am-2 pm. KeyPoint's donation will be made directly to the Los Paseos Aquatic Club approximately 30-45 days after the promotion closes on July 30, 2023.