

Financial Wellness Worksheet

Los Paseos Aquatic Club

Name: _____

Budget	A estimation of your expected income and expenses over a future time period. It's a summary of the money coming in and going out of your account.
How to Budget	Determine Your Monthly Income
	Track Your Monthly Expenses
	Save the Extra!



Build a Budget

Directions: Fill out the blanks in the budget below.

Monthly Budget		
Income	\$ Planned	\$ Actual Earned/ Spent
Job	\$800.00	\$655.00
Other	\$200.00	\$100.00
Total:	_____	_____
Savings/ Debt Management		
Savings Fund	\$160.00	\$131.00
Credit Card	\$100.00	\$55.00
Total:	_____	_____
Expenses		
Car Insurance/ Payments	\$100.00	\$100.00
Cell Phone	\$50.00	\$50.00
Gas Fuel	\$80.00	\$111.39
Groceries	\$125.00	\$62.60
Total:	_____	_____
Entertainment & Misc.		
Movies/Concerts/Sports	\$120.00	\$123.97
Coffee/Dinning Out	\$125.00	\$111.54
Clothes/Shoes	\$100.00	\$56.30
Other	\$40.00	\$53.20
Total:	_____	_____
Carryover for Next Month	_____	_____

Healthy Money Habits?

Directions: Using the budget, answer the questions below.

1 After reviewing the actual expenses, did they align with the budgeted plan? Why or why not?

2 What should be changed, if anything, for next month?

3 If money is left over at the end of the month, where should this money go?

4 How do you prioritize spending on essential items?

Budget Goals

Directions: Identify your budget goals.



What are your needs?

What are your wants?

How can balance these needs and wants with your savings goal?

What are you saving for?

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.