Track'n Your Savings Goals



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Revised October 2008

MONTANA EXTENSION

Thank You for Funding

- Montana Credit Unions for Community Development
- First Interstate BancSystem Foundation

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Front Cover



Back Cover



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What are you saving for?

Savings Goals

Get-Away	Vehicle	College	Gifts	Retirement
Vacation	Truck	Tuition	Birthday	Travel
Summer	Automobile	Books	Baby	Living
Winter	Motorcycle	Room/Board	Holidays	Expenses
Weekend	Snowmobile	Computer	Anniversaries	
	Bicycle	Supplies	Wedding	
	Vacation Summer Winter	Vacation Truck Summer Automobile Winter Motorcycle Weekend Snowmobile	Vacation Truck Tuition Summer Automobile Books Winter Motorcycle Room/Board Weekend Snowmobile Computer	Vacation Truck Tuition Birthday Summer Automobile Books Baby Winter Motorcycle Room/Board Holidays Weekend Snowmobile Computer Anniversaries

Fig. 1. Savings goals

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Decide on Amount Needed:

Figure	.	My Savi							
Write Goals Here>	Fix-It	Vacation	Car	College	Retire				
Date Needed	2003	2004	2005	2021					
\$ Needed	\$ 1,000	\$ 1,000	\$ 2,000	\$???	\$???				
\$ Already Saved	- 0.00	- 0.00	- 0.00	-0.00	- 0.00				
\$ Still Needed	= 1,000	=1,000	= 2,000	= ???	= ???				

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My Savings Goals:

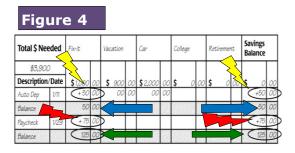
Figure	2	My Sa	My Savings Goals									
Write Goals Here>												
Date Needed												
\$ Needed	\$	\$	\$	\$	\$							
\$ Already Saved	-	-	-	-	-							
\$ Still Needed	=	=	=	=	=							

Savings Register Example

Figure	3														
Total \$ Needed	Fix-it		Vacation		Car		College			Retirement		1t	Savings Balance		
\$4,000															i i
Description/Date	\$1,000	00	\$ 1,000	00	\$2,000	00	Ś	00	00	\$	0	00	\$	0	00

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Recording a Savings Deposit



Recording a Deposit --Split Among Goals____

Total \$ Needed	Fix-it		Vacation		Car		College	Retiremen	t		ings ance	
\$3,900		П										
Description/Date	\$1,000	00	\$ 900	00	\$2,000	00	\$ 00	Dr. 3	00	\$	0	0
Auto Dep 1/11	+50	00	00	00	00	00		7	>		+50	0
Balance	2 50	00	3		3				1		50	0
Paycheck 1/29	+ 75	00	+55	00	+20	00				2	+150	0
Balance	C 125	00	55	00	20	00				7	200	0

Figure 5

Recording a Savings Withdrawal

\$3,900 Description/Date		Fix-it	Fix-it		Vacation		Car		College			Retirement			Savings Balance		
			П				00								0	00	
		\$1,000	00	\$ 900	00	\$2,000		\$ 0	0	00	\$	0	00	\$			
Auto Dep	1/11	+50	00	00	00	00	00								+50	00	
Balance		50	00												50	00	
Paycheck	1/29	+ 75	00	+55	00	+20	00			П					+150	00	
Balance		125	00	55	00	20	00								200	00	
Withdrawal	2/25	-80	00			~				≥					-80	00	
Balance		45	00			<			100	$\overline{}$			5	><	120	00	

Savings Goals Register:

	keg	15	tei	Ī							P	ag	je 3	3	
	Total \$ Needed		Fix-it		Vacation	Vacation		Car			Retiren	1ent	Savings Balance		
	\$4,000									Π		Т			
(1	Description/	Date	\$1,000	00	\$ 1,000	00	\$2,000	00	\$ 0	00	\$	0 00	\$ 0	00	
	Auto Dep	1/11 (b)→ +50	00	00	00	00	00					9+50	00	
2	Balance	(5 0 ←	00						Г			3→ 50	00	
	Paycheck	1/29(g) → + 75	oq	3→ +55	oq	g)→ +20	00		Г			→ +150	00	
8	Balance	(n)→ 125	oq	h → 55	oq	h)→ 20	00		Г			D > 200	00	
	Withdrawal	2/25	→ -80	00						Г			-80	00	
	Balance		→ 45	00									> 120	00	

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Sample Savings Register:

Total \$ Needed						Savings Balance	
Description/Date	\$	\$	\$	\$	\$	\$	

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