NAMES: _____

FACTORS INFLUENCING FINANCIAL GOALS

With a partner or in a small group, create a financial goal and fill out a T-Chart, identifying any barriers or opportunities for reaching your financial goal.
You may be asked to present this to the class.

What is your financial goal? (i.e. saving, earning, donating/fundraising)

Describe your goal: (i.e. fundraiser for an animal shelter, earning $500 by washing cars, etc.)

Are there any start-up costs for your financial goal? Describe:

How long will it take you to achieve your financial goal without barriers? On a separate page, provide a timeline of events and dates that shows how you will achieve your goal.

FACTORS INFLUENCING FINANCIAL GOALS

Anticipate potential barriers and consider factors that may help or interfere with reaching your financial goal.

Some factors include: income, expenses, priorities, health, personal and family situation, social factors (e.g., social inequalities)

Opportunities	Potential Barriers

Solutions

List as many solutions as you can think of for the barriers identified in your chart.
(e.g., research, adjusting timelines, advocacy, involving community members)

MY EVENT CALENDAR

Name _____ Date _____



You may use this to provide a timeline of events to express what you will need to do and when to achieve your financial goal. NOTE: this organizer may not work for everyone's financial goal.

MONTH(S):

DAY 1	DAY 2	DAY 3	DAY 4
i.e. purchase goods. $50	i.e. pay venue $250		

DAY 5	DAY 6	DAY 7	DAY 8