



Finance Vision Board



Use this worksheet to outline where you want your finances to be a year from now, 25 years from now or 40 years from now.

DATE _____

YOUR TOTAL ACCOUNT BALANCE
\$ _____

CHECKING
\$ _____

SAVINGS
\$ _____

INVESTMENTS
\$ _____

EMERGENCY FUND
\$ _____

VISION TYPE	MY PLAN	HOW I'M GOING TO DO THIS
SAVINGS VISION		
INVESTMENTS VISION		
EMERGENCY FUND VISION		