



Your Financial Tool Kit

Developed by the Financial Consumer Agency of Canada, the Investor Education Fund and l'Autorité des marchés financiers



My goals

Short-term goals (within the next year)	Estimated cost
Short-term goal #1	<input type="text"/>
Short-term goal #2	<input type="text"/>
Short-term goal #3	<input type="text"/>
Total short-term cost:	<input type="text"/>

Mid-term goals (one to three years)	Estimated cost
Medium-term goal #1	<input type="text"/>
Medium-term goal #2	<input type="text"/>
Medium-term goal #3	<input type="text"/>
Total mid-term cost:	<input type="text"/>

Long-term goals (more than three years)	Estimated cost
Long-term goal #1	<input type="text"/>
Long-term goal #2	<input type="text"/>
Long-term goal #3	<input type="text"/>
Total long-term cost:	<input type="text"/>



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My savings plan

Now you have an idea of what to save for, and how much you need to save. You can plan to save the money you'll need to meet your goals. Use this chart to plan how much you need to save over a period of time.

Goal	Cost	Time-frame (months)	Monthly savings
Total savings I need per month:			



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My savings checklist

OK	Does not apply	What I'll do	When I'll do it
<input type="checkbox"/>	<input type="checkbox"/>	I'll track my income and expenses to create a monthly budget	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	I'll identify expenses I can cut out, or cut down	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	I'll identify ways to increase my income (work extra hours, sell handicrafts, etc.)	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	I'll set up a dedicated savings account	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	I'll set up an automatic transfer to my savings account	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	I'll check each month that I meet the savings goal I set for myself	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	Other	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	Other	<input type="text"/>