

Note Taking Sheet

Use the following to take notes during the session, think about the answers after the visit, or bring home and talk through these answers with your family.

Date:

Setting Saving Goals

Why do you think it's important to learn about saving, budgeting, and earning money?

What is something you want to save up for? (Ex: new video game, toy, bike, phone)

Steps to reach your saving goal:

- 1.
- 2.
- 3.

How can having a savings account be helpful?

What is a loan? What are some examples of when you might need to consider a loan?

Final Thoughts

What are 3 things you learned today?

- 1.
- 2.
- 3.





Notes

Use the space below to take any notes or write down any questions you have!

