

Savings goal activity tracker



Track your savings goals to learn how much money you'd want to set aside to achieve your goals. Be sure to include short-term goals (for example, a holiday or car) and long-term goals (for example, a house or retirement) so that you get the full picture of what you may need to save each month to achieve your goals. **Save a copy of this to your device so you can refer to it and update it regularly.**

DATE COMPLETED

Savings Goal Name	Goal Amount* (Local Currency)	By When* Years	By When* Months	Current Savings Balance* (Local Currency)	Estimated Annual Interest / Return Rate*	Estimated Monthly Contribution (Local Currency)
Example: Wedding	10,000.00	1	6	1,000.00	4.00%	483.00
SAVINGS GOAL TOTALS						

Note: all numerical entries must be greater than or equal to zero (0). If you don't know or cannot estimate the interest/return rate, input zero (0). If any interest is payable (or you achieve some positive investment returns) then you may end up with more money than you anticipated by the time of your target date.

The asterisk () indicates a required field in order to calculate monthly contributions.*

Once you have clarity on your total savings goals, look for ways to reduce your spending (without taking on debt) in order for you to save even more. Refer to the "Save for any goal" article for more information.

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