

# Instructions for Workshop Leader

Use these slides (in order) with the sections of your session outline.

Welcome and Overview (Slides 2-4)

Activity (Slides 5-6)

Present (Slides 7-11)

Discuss (Slide 12)

Review and Evaluate (Slides 13-18)

Close (Slide 19)





Dream Well

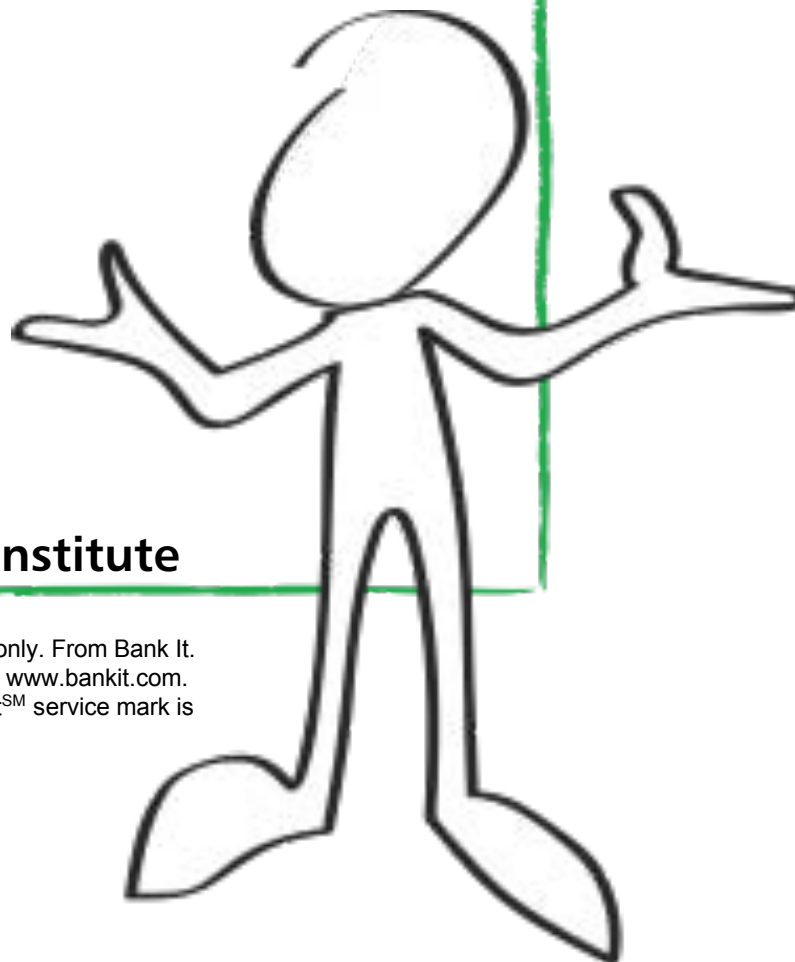
# Welcome to Bank It

## Setting Financial Goals

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# Welcome and Overview

## What is Bank It?

Bank It delivers real-world topics and tools to help you:

- Understand,
- Talk about, and
- Manage your money.

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# Welcome and Overview

Three goals for today:

1. Explain the difference between a short-term and a long-term financial goal.
2. Describe how setting a financial goal helps you pursue your dreams.
3. List at least two decision-making steps to take to pursue a long-term goal.



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# Activity

A financial goal is a money target that you're aiming for.



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# Activity

## Your Goals



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# Present

What's the difference between a short-term and a long-term financial goal?



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# Present

How does setting a financial goal help you pursue your dreams?



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# Present

What is a measurable short-term goal?



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# Present

What are the decision-making steps that you can take to pursue a short-term goal?



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# Present

What are the decision-making steps that you can take to pursue a long-term goal?



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# Discuss

Turn to talk to someone near you.

1. Say your first name.
2. What is one short-term financial goal that you would like to pursue?



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# Review and Evaluate

## What is a financial goal?

A financial goal is a money target you're aiming for.



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# Review and Evaluate

What is the difference between a short-term and a long-term financial goal?

- A short-term financial goal is a goal you can usually accomplish in less than one year.
- A long-term financial goal is a goal you can usually accomplish in five years or more.



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# Review and Evaluate

How does setting a financial goal help you pursue your dreams?

1. It gives you a target to aim for.
2. You know where you're going with your dream—and your money.
3. You can develop a plan.



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# Review and Evaluate

What are examples of measurable short-term goals?

- Reading a book about managing your money.
- Reducing your debt on a credit card.
- Creating a budget.
- Saving receipts.
- Reconciling a bank statement.





# Review and Evaluate

What are decision-making steps to take to pursue a short-term goal?

- Name your financial goal.
- Make a plan with a timeline to meet your goal.
- Work toward your goal.
- Evaluate your progress.
- Make changes to your plan if you're hitting obstacles.



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# Review and Evaluate

What are decision-making steps to take to pursue a long-term goal?

1. Name your financial goal.
2. Make a plan with a timeline to meet your goal.
3. Work toward your goal.
4. Evaluate your progress.
5. Make changes to your plan if you're hitting obstacles.



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# Close

Which financial goals can help you pursue your dreams?



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