

Number

Financial Road Map  
Spending Plan



Occupation: \_\_\_\_\_ A. Monthly Salary: \$ \_\_\_\_\_  
Spouse's Occupation: \_\_\_\_\_ B. Spouse's Monthly Salary: \$ \_\_\_\_\_  
C. Monthly Income Pre-tax: \$ \_\_\_\_\_  
D. Monthly Taxes: \$ \_\_\_\_\_  
E. **Total Monthly Income\***: \$ \_\_\_\_\_

\*Add to upper right hand corner of your check ledger below

- 1. Pay Yourself First - Put 10% of Pay in Savings: \$ \_\_\_\_\_
- 2. Debt Station - Student Loan Debt: \$ \_\_\_\_\_ Credit Card Debt: \$ \_\_\_\_\_ (To Be Paid at Station 12)
- 3. Family Matters - Number of Children: \_\_\_\_\_ Childcare Expenses: \$ \_\_\_\_\_ Household Size: \_\_\_\_\_
- 4. Employer Benefits - Insurance? Y N Cost: \$ \_\_\_\_\_ (**BONUS** 401(k): \$ \_\_\_\_\_)
- 5. Housing - Payment/Rent: \$ \_\_\_\_\_
- 6. Utilities - Plan Selected: \_\_\_\_\_ + **BONUS** Option: Y N = Cost: \$ \_\_\_\_\_
- 7. Transportation – (Credit: G B ) Type: \_\_\_\_\_ + Insurance: \$ \_\_\_\_\_ + Gas: \$ \_\_\_\_\_ = Cost: \$ \_\_\_\_\_
- 8. Medical Matters - Cost: \$ \_\_\_\_\_
- 9. Groceries – Cost: \$ \_\_\_\_\_
- 10. Show Me the Money - Amount \$ \_\_\_\_\_
- 11. Style Time – Clothing: \$ \_\_\_\_\_ Personal Care: \$ \_\_\_\_\_
- 12. Credit Card Crunch - Payment Made: \$ \_\_\_\_\_
- 13. Entertainment - Activity One Amount: \$ \_\_\_\_\_ Activity Two Amount: \$ \_\_\_\_\_
- 14. Expect the Unexpected - Cost: \$ \_\_\_\_\_
- 15. Magic Wand - Number One: \_\_\_\_\_ Number Two: \_\_\_\_\_

**Discussion Questions**

- 1. What did you learn about managing money?
- 2. What was the final balance in your checking account?
- 3. What was the final balance in your savings account?
- 4. Did you take advantage of the bonus options offered in the game? Why or why not?
- 5. What choices did you change with your magic wand?
- 6. What could make this experience better?

