MY $5,000 MONEY CHECK-IN

Building Success with Liz | Companion Worksheet

Having $5,000 saved and owing $5,000 may look like equal numbers on paper, but they affect your finances very differently. Use this worksheet to see where you stand today, understand what your debt is costing you, and decide what your next $5,000 goal should be.

PART 1: WHERE DO I STAND TODAY?

My Money Snapshot	Amount
Checking account	$________________
Savings account	$________________
Emergency fund	$________________
Other available savings	$________________
TOTAL CASH / SAVINGS	**$________________**

PART 2: WHAT DO I OWE?

Debt	Balance	Interest Rate	Minimum Payment
Credit Card 1	$________	______%	$________
Credit Card 2	$________	______%	$________
Personal Loan	$________	______%	$________
Medical / Other Debt	$________	______%	$________
Other	$________	______%	$________
TOTAL	**$________**		**$________**

PART 3: THE $5,000 QUESTION

If I received $5,000 today, what would I do with it?

Save	$____________	Pay toward debt	$____________
Necessary expenses	$____________	Invest	$____________
Other	$____________	**TOTAL**	**$5,000**

Why did I divide the money this way?

MY $5,000 ACTION PLAN

Turn the number into a goal you can actually follow.

PART 4: WHICH $5,000 WOULD CHANGE MY LIFE MORE?

- ■ Building my first $5,000 in savings
- ■ Paying off $5,000 of debt
- ■ Doing both at the same time
- ■ I'm not sure yet

What is making this my priority?

PART 5: BUILD MY PLAN

My first goal:	$____
I want to reach it by:	____
Amount I can put toward it each month:	$____
Amount I can put toward it each week:	$____

Three things I can change or do to find that money:

1. ____
2. ____
3. ____

PART 6: $5,000 PROGRESS TRACKER

Color in one circle every time you save or pay **$250** toward your goal. **20 circles x $250 = $5,000.**

O $250	O $500	O $750	O $1,000	O $1,250
O $1,500	O $1,750	O $2,000	O $2,250	O $2,500
O $2,750	O $3,000	O $3,250	O $3,500	O $3,750
O $4,000	O $4,250	O $4,500	O $4,750	O $5,000

FINAL REFLECTION

When I reach this $5,000 goal, what will be different for me?

Building Success with Liz
Small financial decisions can create big changes over time.