

# Manage Your Money

Worksheet for Setting Financial Goals

## TRACK DAILY SPENDING

**DIRECTIONS:** Write your major spending categories across the top. Record each daily spend throughout the month.

Categories								
Day								
1								
2								
3								
4								
5								
6								
7								

## SET FINANCIAL GOALS

### Short-Term Goals

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- 
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### Medium-Term Goals

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### Long-Term Goals

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This information is general in nature and is not intended to be legal, tax, or financial advice. Although Regions believes this information to be accurate, it cannot ensure that it will remain up to date. Statements or opinions of individuals referenced herein are their own—not Regions'. Consult an appropriate professional concerning your specific situation and irs.gov for current tax rules.

ENERGIZE YOURSELF FINANCIALLY



# My Retirement Savings Plan

Worksheet to Plan for Your Future

## DECISION FACTORS

- |  |  |  |
|--|--|--|
| <b>1</b> How much money do you want to accumulate over a certain period of time? | <b>2</b> How long can you leave your money invested? | <b>3</b> How do you feel about risking your money? |
|--|--|--|

## ACTION PLAN

What will I do now to save toward my goals?

What will I do by the end of the month to save money towards my goals?

What will I do by the end of the year to save money towards my goals?



### My Life Stage:

Young Adult • Family • Mature • Retirement

List your next steps here.

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## RETIRE WITH CONFIDENCE

### Balanced Approach

Three goals for your wealth and the assets that can help achieve them:

#### Protecting Your Lifestyle Today

- Cash on hand
- Home equity
- Insurance

#### Enhancing Your Lifestyle

- Investment real estate
- Family business
- Royalties

#### Preserving Your Lifestyle For The Future

- Fixed income securities
- Stocks
- Bonds

## LEARN MORE

### Calculators and Resources

Whether you want to know how long your retirement will last or you want to estimate the amount of retirement income you will need... your answers can be found at [regions.com/calculators](https://regions.com/calculators).

For additional retirement resources, visit [regions.com/retirement](https://regions.com/retirement).

### The Changing Face of Wealth

Managing money has long been viewed by some as the domain of men, who historically held the bulk of assets. But the world is changing, and women are quickly gaining ground when it comes to financial status. Read more at [regions.com/hervisionherlegacy](https://regions.com/hervisionherlegacy).

### Note

**If you are more inclined to seek advice from a woman, more women than ever are entering the field of financial advising!**



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