

Creating a Personal Financial Timeline Worksheet

Student Name: _____ Date: _____

Directions: Fill out the chart. **Transfer** this information onto your personal financial timeline.

Milestone	Estimated years to save	Estimated Cost per year	Save for/ pursue other funding?	Plan: short/mid or long term?
Youth (1–17)				
Young Adult (18–24)				
Adult (25–40)				
Middle Age (41–65)				
Senior (65 and up)				

Before handing in your assignment, check to make sure it meets or exceeds the following assessment criteria:

- The timeline is correctly organized: it is presented creatively, broken into age categories, and every five years are labeled.
- The 10 milestones are clearly identifiable and presented in chronological order.
- One milestone students plan to save for will be explained on the timeline: the estimated cost, the length of time to save, and why this is an important milestone they wish to reach.
- At least three images reinforce the information on the timeline.
- The timeline is neat and uses proper spelling and grammar.