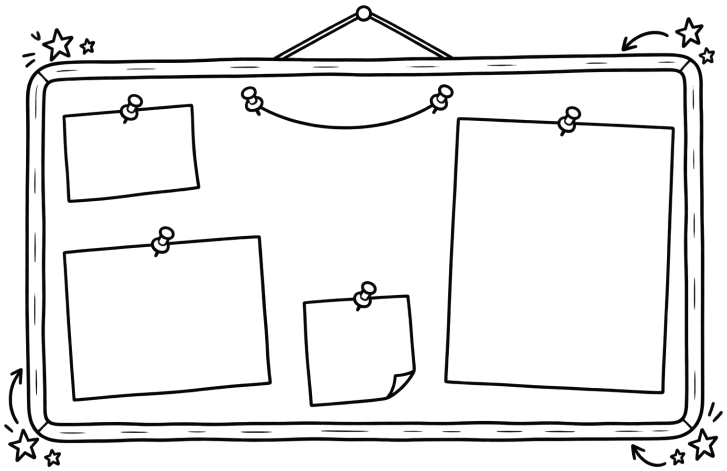
Money Goals Vision Board

Name _____ Date _____

Pin your goals to the board: write or draw a 1-month goal on the small card, a 1-year goal on the medium card and a 5-year goal on the big card. Then plan each one below.



1 MONTH

small and fast: a win you can get soon

Goal: _____ **Cost: $** _____

First step this week: _____ **Per month: $** _____

1 YEAR

needs a plan and steady saving

Goal: _____ **Cost: $** _____

First step this week: _____ **Per month: $** _____

5 YEARS

big: college, a car, a business, investing

Goal: _____ **Cost: $** _____

First step this week: _____ **Per month: $** _____

Per month = cost ÷ number of months. For 1 year, divide by 12. For 5 years, divide by 60.

MY MONEY CHOICE

What will you do THIS WEEK toward goal #1?

_____

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Money Goals Vision Board

The quick lesson (read aloud, about 1 minute)

> Goals happen when they're **specific** (what exactly), **priced** (how much) and broken into **steps**. Short goals build confidence. Long goals need time, and time is what makes saving and investing grow. The first step is the one that matters most: it turns a wish into a plan.

Two teaching points

1. Price it, then divide by the months you have.
2. Start one small step this week.

Answer key

No single right answer. Check the math: per month = cost ÷ months (e.g., a $1,200 goal in 1 year = $100 a month; $6,000 in 5 years = $100 a month). Look for first steps that are specific and doable this week.

10-minute run

1. Fill the board (4 min).
2. Price each goal and find the monthly amount.
3. Share one first step with a partner.

Ask

"Which goal might change as you get older? Is that OK?"

Goal

Goals work when they're specific, priced and broken into steps you can start now.

Take it further

Have students set a reminder for 30 days from now to check their 1-month goal.

Standard: National Standards for Personal Financial Education (Council for Economic Education and Jump$tart), area: **Saving and Investing**. Print double-sided: the activity on the front, this teaching side on the back.

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