

ALMSTROM FINANCIAL COACHING, LLC

AFC CHRISTMAS FINANCIAL PLANNER

Brainstorm. First, brainstorm all the things you do for the holidays. Fill out column one for this part of the exercise.

Price it out. Next, let's estimate what amount each line item will cost.

Prioritize. Now it's time to get serious. Circle the priorities, especially understanding that you're working within a budget this year. What are the must-dos, must-haves?

Budget. Finally, add up the items you've decided are important for you and your family. What is the total amount you'll need? How much do you need to set aside to hit that goal this year?

Item/Activity:

Cost:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Budget.

Total \$ Needed:

Months until it's needed:

\$ to set aside each month:

\$ _____

\$ _____

*Tip: Now that you've done this, think about reprinting and doing it for the entire next calendar year and seeing how your monthly sinking fund changes.