



Summary Follow-Up

Student Name _____ Date ___/___/___

Fundamental Skills Improvement

___ How organized are your personal files? (previous score ___)

___ Written financial goals? (previous score ___)

___ Budget worksheet (previous score ___)

Completed Goals:

1. _____
2. _____
3. _____
4. _____
5. _____

New Goals:

Deadline

- | | |
|----------|-------------|
| 1. _____ | ___/___/___ |
| 2. _____ | ___/___/___ |
| 3. _____ | ___/___/___ |
| 4. _____ | ___/___/___ |
| 5. _____ | ___/___/___ |

Session #2 _____ #3 _____