CHECKLIST · FINANCIAL MANAGEMENT

FREE PREVIEW

Setting Up an Automatic Savings Plan



Automating your savings helps you build wealth effortlessly and stay consistent with your financial goals. Use this checklist to establish an effective automatic savings plan.

8 steps · Print-ready A4

NAME	START	TARGET DATE

1 Choose a Savings Goal

Define what you're saving for, such as an emergency fund, vacation, or retirement.

EXAMPLE *"Save $1,000 for a new laptop in 6 months."*

2 Open a Dedicated Savings Account

Use a separate account to keep savings organized and reduce the temptation to spend.

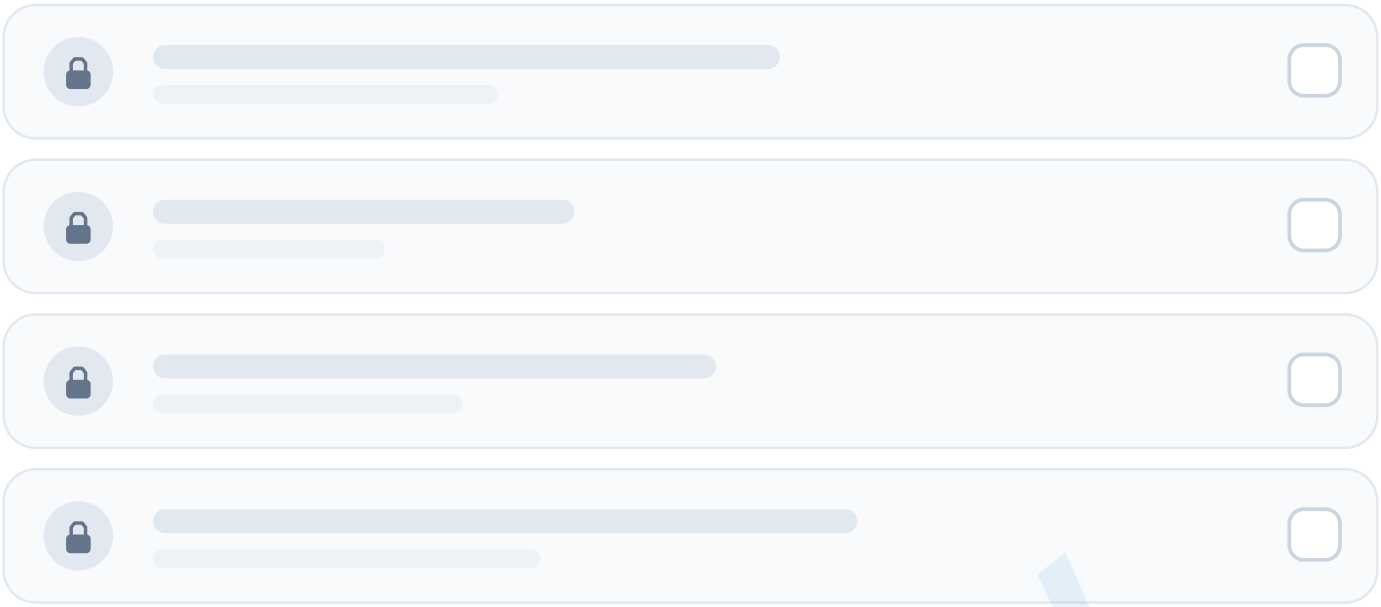
TIP *Look for high-yield savings accounts to earn more interest.*

3 Set a Monthly Contribution Amount

Calculate how much you can save each paycheck or month.

EXAMPLE *"Transfer $150 from each paycheck."*

PREVIEW



Like the design?

Get the full version: every step with examples and tips, a reflection page, no watermark.

Get the full version

PREVIEW