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### CC98-411 Money 2000+ Savings/Debt Tracker

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# Savings/Debt Tracker

## Is My Savings Growing?

My *Money 2000+* Savings goal is: \$ \_\_\_\_\_.

Write amounts in columns monthly to track progress in reaching *Money 2000+* goal(s).

Savings <sup>1</sup>	Beginning Month 1	End of Month 1	End of Month 2	End of Month 3	End Month 4	End of Month 5	End of Month 6
Savings Accounts:							
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Money Market Accounts:							
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Stocks, Mutual Funds:							
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Bonds (savings, government, corporate, CDs):							
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Private Retirement Funds (including IRAs, annuities):							
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total Savings</b>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____



*The difference is how much progress I've made in my savings goal this past 6 months.*

Every six months, you will be asked to report your progress when you receive a *Money 2000+* Progress Report. You will also get a new *Money 2000+* Savings/Debt Tracker like this one for the next 6 months. When you get your new Tracker, transfer your figures from the last column of this sheet to the first column of the new sheet and you've begun the next 6 months of *Money 2000+*.

<sup>1</sup>Savings for *Money 2000+* does not include mandatory or forced savings such as required retirement savings. The purpose of this program is to increase discretionary savings.





# Savings/Debt Tracker

Is My Debt Shrinking? My *Money 2000+* debt reduction goal is \$\_\_\_\_\_.

Write amounts in columns monthly to track progress in reaching *Money 2000+* goal(s).

Debts <sup>2</sup>	Beginning Month 1	End of Month 1	End of Month 2	End of Month 3	End Month 4	End of Month 5	End of Month 6
Past Due Bills	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Credit Cards	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Vehicle Loans	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Home Equity Loan	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Personal, Other Loans	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total Debt</b>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____



*The difference is how much progress I've made in reducing my debt this past 6 months.*

When you receive a new *Money 2000+* Savings/Debt Progress Report for the next 6 months, transfer your figures from the last column of this sheet to the first column of the new sheet and you've begun the next 6 months of *Money 2000+*.

This publication was adapted from material produced by Iowa State University, University Extension, September 1997.

<sup>2</sup>*Money 2000+* does not include mortgage loans for the debt reduction portion of your goal(s). The purpose of this program is to encourage reduction of discretionary consumer debt.