

automatic savings **WORKSHEET**

For what do I want to save?

Ex: retirement, down payment, school

What are my savings account options?

Ex: online savings account, IRA

How will the transfer be made?

Ex: direct deposit from paycheck, automatic transfer from bank account

How much will I save? At what frequency?

Ex: monthly, weekly, per paycheck

**DEADLINE...When will first automatic
payment be made?**

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