

ACTION PLAN
Income Tax Return

	Estimated Return Total \$ _____
Savings (Asset/Emergencies/Periodic Expenses)	
Saving for asset (car, home, education)	\$ _____
Children Savings	\$ _____
Christmas Club	\$ _____
IDA (Matched Savings Account Deposit)	\$ _____
Emergency Fund	\$ _____
Car Repairs	\$ _____
Car Registration	\$ _____
Car Inspection	\$ _____
Home Repair/Improvements	\$ _____
Retirement	\$ _____
Other:	
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
	Total \$ _____
Credit Repair/ Paying off Debts	
Debts:	
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
	Total \$ _____
Expenses/ Purchases	
Childcare Expenses (summer care, Day Camps)	\$ _____
Furniture/Appliances	\$ _____
Children Sports (registration, equipment, etc.)	\$ _____
Children's School Activities	\$ _____
Clothing	\$ _____
Birthdays	\$ _____
Vacations	\$ _____
Health Care	\$ _____
Dental	\$ _____
Other:	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
	Total \$ _____