

Funds and Buckets™

Name: _____

Date: _____

- Create specific funds, or buckets, with a special purpose and then add savings to each fund on a regular basis.
- Create a specific investment plan for each fund (with different goals - the investment options should be different, too).
- Create one fund that you *do not touch* except for an extreme emergency.
- Allocate your savings based on each fund (for example, your investment fund might get X percent of your savings, your Walk Away Fund™ gets Y percent of your savings, and so on).

Review your net worth statement and how you pictured or visualized your retirement. Now look at the funds below and pick three or four that you want to start right away. Write down exactly how you see these funds working for you.

- Walk Away Fund™
- Get out of town fund
- Grandkids fund
- College fund
- Charity fund
- Great Memories Fund™
- Family Lake Cabin Fund

Quick Budget	
Expenses	Amount
Home	
Utilities	
Food	
Insurance	
Transportation	
Fun	
Travel	
Real Estate	
Charity/Church	
Misc.	

Total \$ _____

All Monthly Income
From Sources \$ _____

Money Available to Allocate
to Funds and Buckets \$ _____













Allocate money to each bucket monthly and use ONLY for the specific needs and fund described.