



GETTING ON TRACK WORKSHOP OVERVIEW

Workshop Description

In this workshop, participants will learn how to track expenses and create a spending plan that they can follow based on actual income and expenses. By tracking their expenses and income, participants will begin to create a budget. This workshop will teach the importance of maintaining a budget and the role it plays in staying on track financially.

Key Workshop Goals

- Understand the importance of a budget
- Develop a working budget
- Balance a budget
- Adapt a budget for new circumstances

Core Skills Covered

- Properly tracking and categorizing expenses
- Creating a budget based on actual expenses and income
- Spending less to stay within a budget
- Finding room in a budget for savings

Handouts To Be Discussed

- Getting on Track Class Discussion
- My Budget Template

Follow-up Exercises

- Coach and participant will continue to track expenses and pull participant's credit report