**Financial Education Animated Video Series**

**“Sammi’s Financial Learning Journey”**

**Worksheet**

Watch the video clip “Sammi’s Financial Learning Journey” and answer the following questions.

**A.　 Matching**

**Match “the five steps of financial management” on the left to the explanation on the right. Write down the appropriate number in the blanks.**

|  |  |  |
| --- | --- | --- |
| **Five steps of financial management** |  | **Explanations** |
| Step 1: Specific | **( )** | 1. Goals should be measurable, such as budgeting how much time will need to be spent or how much money will be saved to achieve the goals.
 |
| Step 2: Measurable | **( )** | 1. Set a deadline for your goal. This will make you more determined.
 |
| Step 3: Achievable | **( )** | 1. Goals should be clear and precise.
 |
| Step 4: Realistic | **( )** | 1. Goals should be realistic and reasonable, not overly ambitious, as this will demotivate people.
 |
| Step 5: Time-related | **( )** | 1. The goal should be “down to earth” and meet your needs.
 |

**B. Achieve the goal through proper planning**

**What goals do you want to achieve? Please follow the “Five Steps of Financial Management” to formulate your plan.**

|  |  |
| --- | --- |
| **Goal:****(e.g. to buy an item)** |  |
| **Time needed:** | **I would like to achieve my goal by \_\_\_\_\_\_ week(s)/month(s).** |
| **Target savings amount:** |  |
| **Amount to be saved for each period:** | **(e.g., I have pocket money of $\_\_\_\_\_ every month. I would save $\_\_\_\_\_ per week/ month.)** |