

VITA Participant Name: _____

 VITA Site Location: John Boner Neighborhood Centers

DATE of Return: _____

What's your plan for your REFUND?

Area of Focus	YES or NO	GOAL	Date
Create a cash-flow budget			
Are you tracking your spending?			
Have you created a spending plan?			
What does that look like to you?			
Are you interested in knowing more?			
Develop a debt action plan			
Have you made a list of everyone you owe money to?			
Do you use a snowball effect?			
Savings Plan			
Are you planning to save your refund?			
Do you plan to save in a savings account?			
After each paycheck, do you have money left over?			
Control			
Do you feel your finances control your life?			
Did you utilize free tax prep?			

What's your plan for your REFUND?

Action Plan:

These questions will help you identify your action plan.

What is your game plan?

What does that look like for you?

What actions do you plan to take? Are those reasonable actions?

How does this align with your result?

What is the time frame?

Here is my goal:

Notes:

Would you like more information on financial education programs? Yes or No

If so, please provide your email address. Email Address: _____

Upcoming Programs with Extension

- **Where Does Your \$ Go Session 1-Feb 19 11 am to 12 pm**

Registration Link: https://purdue-edu.zoom.us/meeting/register/g5sys0TgTh2ZKIm_ujcTEA

- **Where Does Your \$ Go Session 2 March 19 11 am to 12 pm**

Registration Link: <https://purdue-edu.zoom.us/meeting/register/YAaLHhGkSOacV3YaURMtMw>

- **Financial 101 March 4 noon to 1 pm**

Registration Link: https://purdue-edu.zoom.us/meeting/register/aORSBhABTS-Lrflb_kFYpQ

- **Staying Scam Safe-April 7 at 1:30 pm**

Registration Link: <https://purdue-edu.zoom.us/meeting/register/Dit1X2b6Qeaqxu79ClyGgQ>