

Name _____ Class Date _____

Where are you in the Home buying process?

- Just started thinking about it. Have a pre-approval and working with a Realtor

List your top 3 reasons for wanting to purchase a home	List your top 3 concerns about buying a home
1	1
2	2
3	3

What are your top 3 goals	What is your timelines for these goals?
1.	
2.	
3.	

Now that you have completed your spending plan, are you happy with the way you deal with money? Yes No

What would you like to change? _____

Review your spending plan and list the following:

Fixed Expenses	Flexible Expenses	Periodic Expenses
1.	1.	1.
2.	2.	2.
3.	3.	3.

Consider your typical spending habits and rate the following:

1. What things would be easiest to change? _____
2. What things would be hardest to change? _____

How would you rate your spending habits	How would you rate your saving habits
<input type="checkbox"/> I never use credit, I use savings to make purchases	<input type="checkbox"/> I save more than 10% of each paycheck
<input type="checkbox"/> I have no long-term debt and pay full balances monthly	<input type="checkbox"/> I save 10%, and use for present/future needs
<input type="checkbox"/> I use credit only for major purchases	<input type="checkbox"/> I save when I can and use when needed
<input type="checkbox"/> I often borrow to my credit limit	<input type="checkbox"/> I have little to no money saved except retirement
<input type="checkbox"/> I am overextended on my credit cards	<input type="checkbox"/> I have no savings or pension plan

What topics do you need more information about:

- 1.
- 2.
- 3.
- 4.