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# FINANCIAL PORTFOLIO SCORESHEET

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

FIN Acct. Goal: \$ \_\_\_\_\_ Reserve Fund Goal: \$ \_\_\_\_\_ Starting Funds: \$ \_\_\_\_\_

Financial Wisdom Points (FWPs)		Job
		Job income \$
		Monthly Expenses \$
		Remaining Monthly Cash \$
Credit Line FWPs used		
Debt Balance \$	x Interest Rate of 4%	= Personal Debt Payment - (\$ )
DEPOSIT FUNDS TO INVEST IN ANY OF THE ACCOUNTS BELOW		Other Expenses - (\$ )
FIN Account Balance \$	FIN Int. Rate 3% = (Reinvest into FIN account)	Deduct 10% early withdrawal penalty at Payday 10% Penalty - (\$ )
Reserve Fund Acct. Balance \$	RF Rate 1%	<b>RF Interest</b> \$
Miscellaneous* Acct. Balance \$ Acct: Name:	Int. Rate 2%	<b>MI Interest</b> \$
Miscellaneous* Acct. Balance \$ Acct: Name:	Int. Rate 2%	<b>MI Interest</b> \$
Miscellaneous* Acct. Balance \$ Acct: Name:	Int. Rate 2%	<b>MI Interest</b> \$
Miscellaneous* Acct. Balance \$ Acct: Name:	Int. Rate 2%	<b>MI Interest</b> \$
<p>*Designate what you would like to use these accounts for by writing the name in each space. <i>Examples:</i> Investments; Education; Major Purchases; Vacation; Pampering; Sports; etc.</p>		<b>BONUS MONEY</b> \$
		<b>INVESTMENT INCOME</b> \$
		<b>BUSINESS INCOME</b> \$
		<b>REAL ESTATE INCOME</b> \$
		<b>PAYDAY</b> \$





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Stocks, Collectibles, Other		# Purchased @ Value Paid	Total Holdings		These are investments that are assets that you hold until you decide to sell. No cash flow; no dividend.	
			\$			
			\$			
			\$			
			\$			
			\$			
<b>Combined Total Holdings</b>			<b>\$</b>			
Bonds, Commodities		# Purchased @ Cost per Share	Total Value x ROI	Income		
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	
<b>Total Investment Interest Income</b>			<b>\$</b>			
Business						
Name	Price	Loan	Cash Flow	Loan Payment	Net Income	
	\$	\$	\$	-( \$ )	\$	
	\$	\$	\$	-( \$ )	\$	
	\$	\$	\$	-( \$ )	\$	
	\$	\$	\$	-( \$ )	\$	
	\$	\$	\$	-( \$ )	\$	
<b>Monthly Business Expenses</b>					-( \$ )	
<b>Total Business Income</b>			<b>\$</b>			
Real Estate						
Type	Price	Mortgage	Rent	Expenses	Mortgage Pmt	Net Income
	\$	\$	\$	-( \$ )	-( \$ )	\$
	\$	\$	\$	-( \$ )	-( \$ )	\$
	\$	\$	\$	-( \$ )	-( \$ )	\$
	\$	\$	\$	-( \$ )	-( \$ )	\$
	\$	\$	\$	-( \$ )	-( \$ )	\$
<b>Total Rental Income</b>			<b>\$</b>			

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