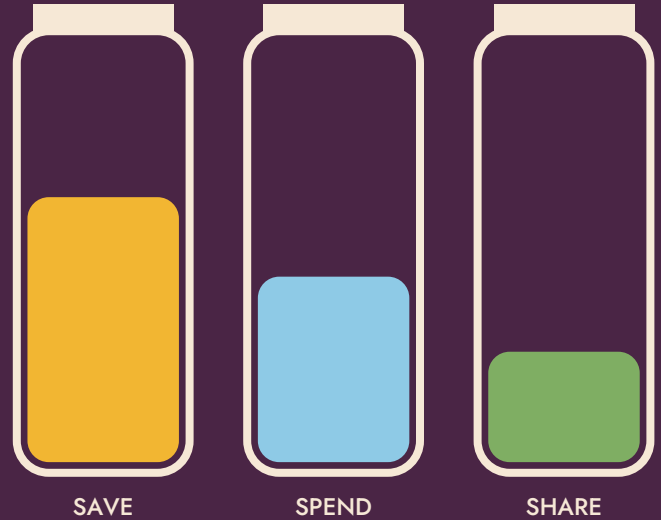




School Year Planner



Costs, activities and allowance

General educational information, not financial, investment or tax advice.
Investment returns are never guaranteed; check plan documents before you decide.
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Back-to-school budget

One column per child. Check what you already have before you buy.

Item	Child 1	Child 2	Child 3	Total
School supplies				
Backpack and lunchbox				
Clothes				
Shoes				
School fees and field trips				
Technology				
Lunches (first month)				
Activity sign-ups				
Other				
Total				

Save ahead

Total from above
Months until school starts
Set aside each month
Sales tax holiday dates (if any)

The fee is only part of it. Add gear, uniform, travel and extras for the full cost.

[illegible]

Ask every program about scholarships and sibling discounts.

Summer care plan

Ten weeks, one row each. Day camp can often be paid with a dependent care FSA; overnight camp can't.

Week	Dates	Who or where	Cost	Registered	Paid
Week 1				☐	☐
Week 2				☐	☐
Week 3				☐	☐
Week 4				☐	☐
Week 5				☐	☐
Week 6				☐	☐
Week 7				☐	☐
Week 8				☐	☐
Week 9				☐	☐
Week 10				☐	☐

Allowance chart

Pin it to the fridge. Each week, write what went into each jar.

Name _____

Allowance each week _____

My saving goal _____

Goal amount _____

Week	Save	Spend	Share	Save total so far
Week 1				
Week 2				
Week 3				
Week 4				
Week 5				
Week 6				
Week 7				
Week 8				
Week 9				
Week 10				

Use the calculator at familynickelsaver.com, then write your plan here and check it once a year.

Child

Savings goal

Account type (529, savings, other)

Monthly amount

Automatic transfer set up?

Yearly check-in

[illegible]

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