



Financial Life Timeline Worksheet

How the Activity Works

Step 1: Draw Your Timeline

Draw a long horizontal line across a page. This represents your life from childhood to today.

Step 2: Add Key Financial Moments

Place markers along the line for important events such as:

-  First job / first paycheck
-  Savings milestones
-  Debt moments (taking on or paying off)
-  Major purchases (car, home, education)
-  Financial stress or hardship
-  Career changes or promotions
-  Investments or financial wins
-  Family or caregiving responsibilities

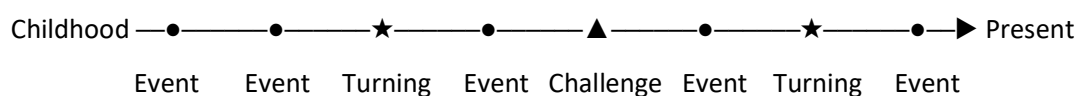
Step 3: Code Your Experiences

Use colours or symbols to show how each moment felt:

-  Positive / Proud
-  Challenging / Stressful
-  Transformative / Turning point
-  Important / Defining moment

My Financial Journey

Use this illustrated guide to draw your timeline with clear markers:



How to draw it: - Draw a long horizontal arrow (left = past, right = present) - Add circles (●) for events along the line - Place symbols above or below to show meaning: - ★ = Turning point - ▲ = Challenge - ● = Neutral/standard event

Add short labels like: - “First paycheck” - “Paid off debt” - “Career change” - “Bought first car”

Create Your Own Timeline

Childhood —————▶ Present

Guided Reflection

Take a moment to reflect on your journey:

✦ 1. What patterns do I notice in my financial decisions?

💡 2. Where did I show resilience or creativity?

🧠 3. Which experiences shaped my beliefs about money?

🚀 4. What lessons will I carry forward?

✦ Looking Ahead (Optional)

🎯 My Next Financial Goals

🤝 Support & Resources I May Need

💬 *Tip: There's no "right" timeline. This is about awareness, not perfection.*