

BUDGET & FINANCIAL PLANNER

This Planner Belongs To

BANK ACCOUNTS

BANK NAME: _____

ACCOUNTS NAME: _____

ACCOUNT NUMBER: _____

TYPE OF ACCOUNT: _____

PHONE NUMBER: _____

WEBSITE: _____

NEAREST BRANCH: _____

NOTES: _____

E-BANKING

USERNAME

PASSWORD

EMAIL ADDRESS

BANK NAME: _____

ACCOUNTS NAME: _____

ACCOUNT NUMBER: _____

TYPE OF ACCOUNT: _____

PHONE NUMBER: _____

WEBSITE: _____

NEAREST BRANCH: _____

NOTES: _____

E-BANKING

USERNAME

PASSWORD

EMAIL ADDRESS

CREDIT CARDS

BANK NAME: _____

ACCOUNTS NAME: _____

CARD NUMBER: _____

EXPIRY DATE: _____

PHONE NUMBER: _____

BANK WEBSITE: _____

NEAREST BRANCH: _____

NOTES: _____

CARD DETAILS

CARD TYPE: _____

CARD NUMBER: _____

CREDIT LIMIT: _____

PIN: _____

BANK NAME: _____

ACCOUNTS NAME: _____

CARD NUMBER: _____

EXPIRY DATE: _____

PHONE NUMBER: _____

BANK WEBSITE: _____

NEAREST BRANCH: _____

NOTES: _____

CARD DETAILS

CARD TYPE: _____

CARD NUMBER: _____

CREDIT LIMIT: _____

PIN: _____

ACCOUNT TRACKER

ACCOUNTS DETAILS:

DATE:	BANK:	ACCOUNT NO:
STARTING BALANCE:	DESCRIPTION:	
BALANCE:	DEPOSIT:	WITHDRAWAL:

ACCOUNTS DETAILS:

DATE:	BANK:	ACCOUNT NO:
STARTING BALANCE:	DESCRIPTION:	
BALANCE:	DEPOSIT:	WITHDRAWAL:

ACCOUNTS DETAILS:

DATE:	BANK:	ACCOUNT NO:
STARTING BALANCE:	DESCRIPTION:	
BALANCE:	DEPOSIT:	WITHDRAWAL:

ACCOUNTS DETAILS:

DATE:	BANK:	ACCOUNT NO:
STARTING BALANCE:	DESCRIPTION:	
BALANCE:	DEPOSIT:	WITHDRAWAL:

MONTHLY BUDGET

MONTHLY GOAL:

MONTH/YEAR:

INCOME

DATE	DESCRIPTION	AMOUNT	AFTER TAX

FIXED EXPENSES

OTHER EXPENSES

RECAP

	GOAL	ACTUAL	DIFFERENCE
EARN			
SPENT			
DEBT			
SAVED			

ZERO BUDGET

MONTH/YEAR:

INCOME	BUDGET	ACTUAL	SAVING PLAN	BUDGET	ACTUAL
TOTAL					
MONTHLY BILL	DUE	AMOUNT			
			TOTAL SAVING LEFTOVER		
BILL TOTAL LEFTOVER					
SINKING FUNDS	BUDGET	ACTUAL	TOTAL SAVING LEFTOVER		
SINKING FUNDS TOTAL LEFTOVER			DAILY LIVING BUDGET ACTUAL		
			DAILY LIVING TOTAL FINAL BUDGET (MAKE IT ZERO)		

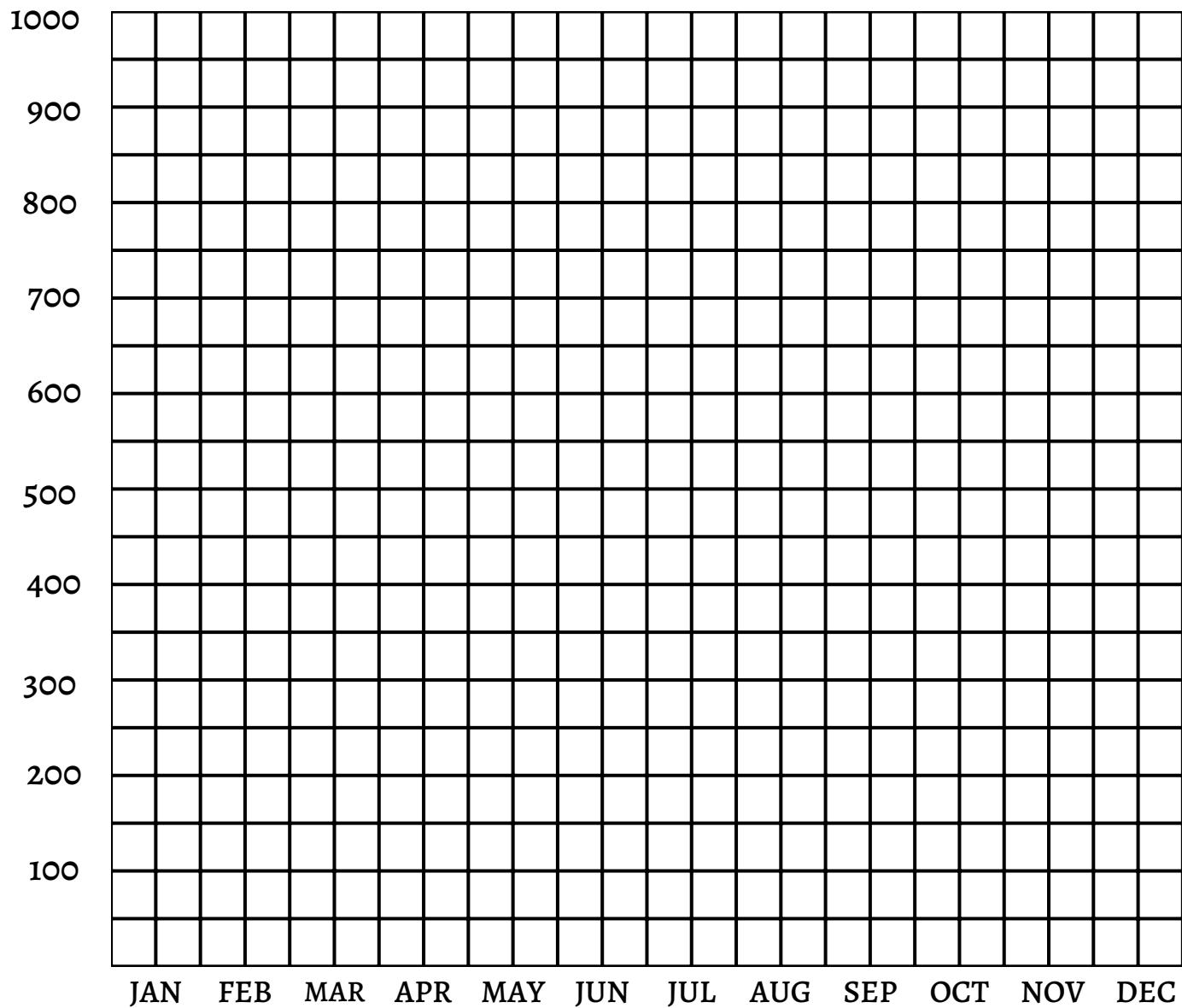
CREDIT SCORE TRACKER

TOP FINANCIAL GOAL:

DATE:

CURRENT SCORE:

GOAL SCORE:



NOTES: _____

SPENDING TRACKER

NO SPEND CHALLENGE

MAIN GOAL:

MONTH:

START DATE:

END DATE:

RULES:

DO NOT BUY LIST

EXCEPTIONALS FROM THE RULES

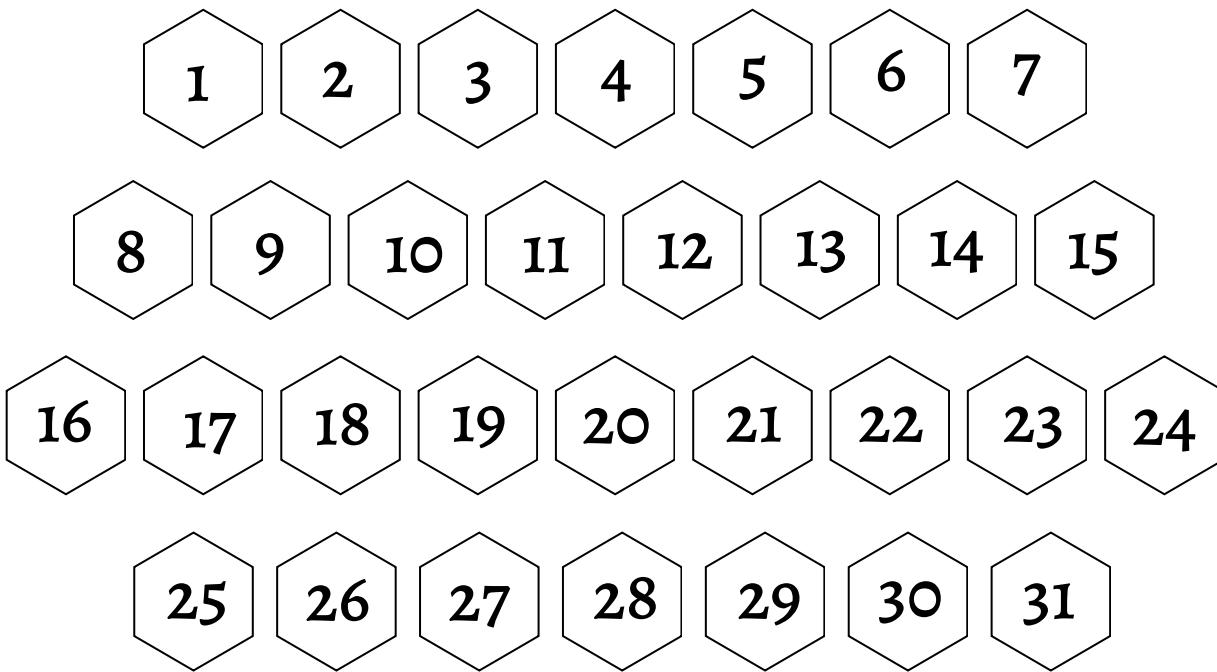
NO SPEND CHALLENGE

MAIN GOAL:

MONTH:

START DATE:

END DATE:



NUMBER OF SUCCESSFUL DAYS:

NUMBER OF UNSUCCESSFUL DAYS:

TOTAL SAVED AMOUNT:

EXPENSES TRACKER

PAYCHECK BUDGET

BUDGET GOAL:

TIME PERIOD:

SOURCES OF INCOME	BUDGET	ACTUAL

TOTAL

TOTAL

SUMMARY	INCOME	EXPENSE	DIFFERENCE
ACTUAL			
BUDGET			

YEARLY EXPENSES

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

INCOME TRACKER

MONTH:

BILL TRACKER

BILL & SUBSCRIPTION TRACKER

BILL	DUEDATE	AMOUNT	J	F	M	A	M	J	J	A	S	O	N	D
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FAMILY BUDGET

HOUSE EXPENSES	BUDGET	ACTUAL	DIFFERENCE	NOTES
AUTO EXPENSES	BUDGET	ACTUAL	DIFFERENCE	NOTES
INSURANCE EXPENSES	BUDGET	ACTUAL	DIFFERENCE	NOTES
LIVING EXPENSES	BUDGET	ACTUAL	DIFFERENCE	NOTES
MSC EXPENSES	BUDGET	ACTUAL	DIFFERENCE	NOTES

ONLINE SHOPPING

BUDGET LIST

TRAVEL	NEW EXPERIENCES	EXERCISE / SPORT
HELPING OTHERS	SELF - FULFILLMENT	EDUCATION

FINANCIAL CALENDAR

NOTES:

FINANCIAL TRACKER

FINANCIAL SUMMARY

	INCOME	SAVINGS	EXPENSES	DEBT PAID	GIVING
JANUARY					
FEBRUARY					
MARCH					
APRIL					
MAY					
JUNE					
JULY					
AUGUST					
SEPTEMBER					
OCTOBER					
NOVEMBER					
DECEMBER					
TOTAL					

TAX DEDUCTIONS

MONTH:

DONATION TRACKER

ANNUAL DONATION LOG

	ORGANIZATION	DESCRIPTION	VALUE
JANUARY			
FEBRUARY			
MARCH			
APRIL			
MAY			
JUNE			
JULY			
AUGUST			
SEPTEMBER			
OCTOBER			
NOVEMBER			
DECEMBER			

SALES TRACKER

BILLING ACCOUNTS

BILL:	BILL:
COMPANY NAME :	COMPANY NAME :
CONTACTS:	CONTACTS:
ACCOUNT NO:	ACCOUNT NO:
PAYMENT METHOD:	PAYMENT METHOD:
PAYMENT DATE:	PAYMENT DATE:
ADDRESS:	ADDRESS:
NOTES:	NOTES:

BILL:	BILL:
COMPANY NAME :	COMPANY NAME :
CONTACTS:	CONTACTS:
ACCOUNT NO:	ACCOUNT NO:
PAYMENT METHOD:	PAYMENT METHOD:
PAYMENT DATE:	PAYMENT DATE:
ADDRESS:	ADDRESS:
NOTES:	NOTES:

SAVING PLANNER

YEAR:

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

MONTHLY GOALS

YEARLY GOALS

52 WEEK SAVING

STARTING BALANCE:	MINIMUM SAVING:
SAVING FOR:	GOAL MONTHLY SAVING:
SAVING GOAL:	GOAL SAVING DATE:

WEEK	AMOUNT SAVED	BALANCE	WEEK	AMOUNT SAVED	BALANCE
1			21		
2			22		
3			23		
4			24		
5			25		
6			26		
7			27		
8			28		
9			29		
10			30		
11			31		
12			32		
13			33		
14			34		
15			35		
16			36		
17			37		
18			38		
19			39		
20			40		

52 WEEK SAVING

STARTING BALANCE:	MINIMUM SAVING:
SAVING FOR:	GOAL MONTHLY SAVING:
SAVING GOAL:	GOAL SAVING DATE:

WEEK	AMOUNT SAVED	BALANCE	WEEK	AMOUNT SAVED	BALANCE
41			47		
42			48		
43			49		
44			50		
45			51		
46			52		

NOTES

SAVING JAR TRACKER



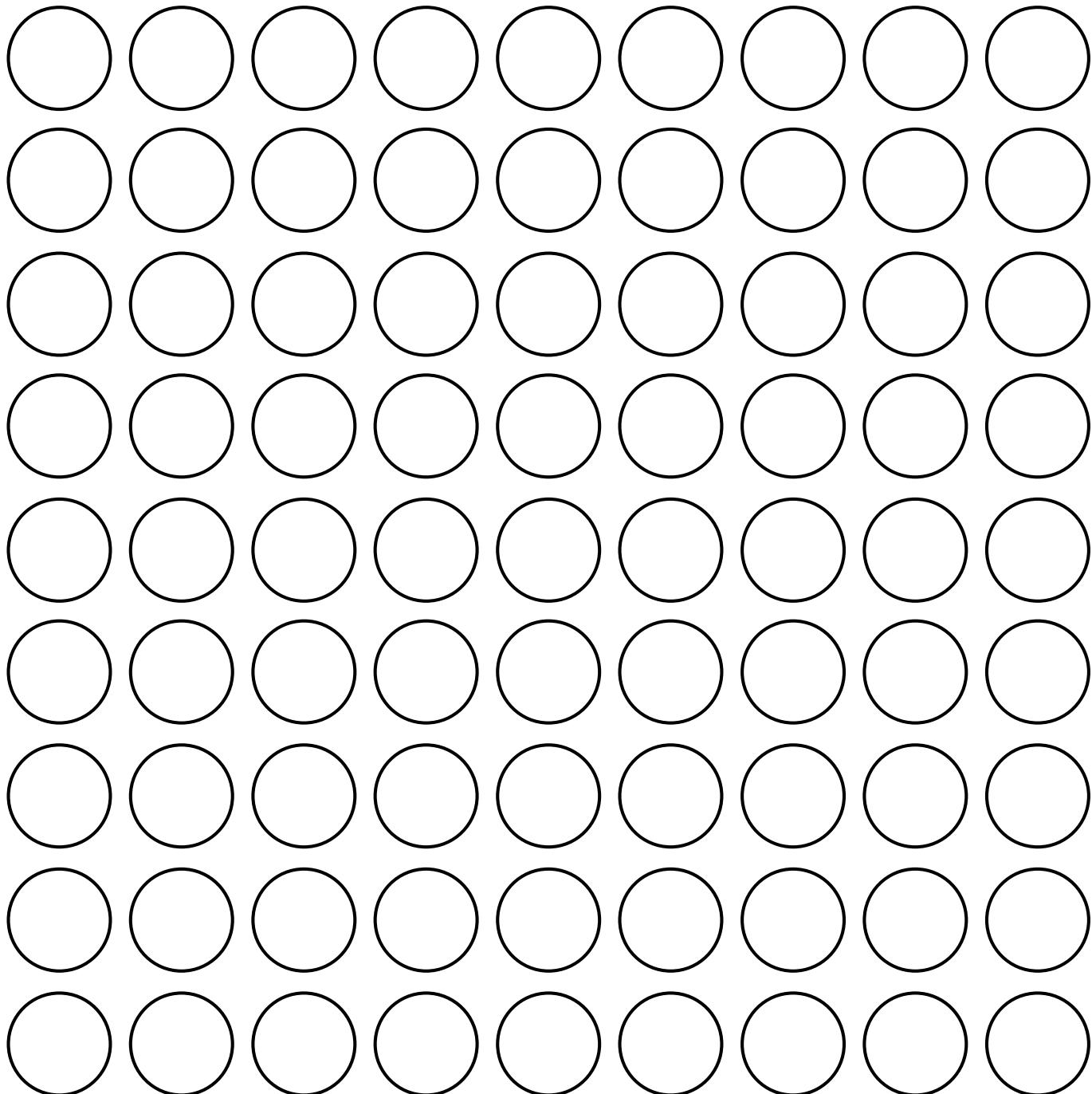
GOAL AMOUNT: _____

= _____

Emergency Fund Tracker

Goal:

Each Icon:



Notes:

3-6 Months Emergency Fund Tracker

Goal:



Goal:



Goal:



Notes:

Notes:

Notes:

Goal:

Goal:

Goal:



Notes:

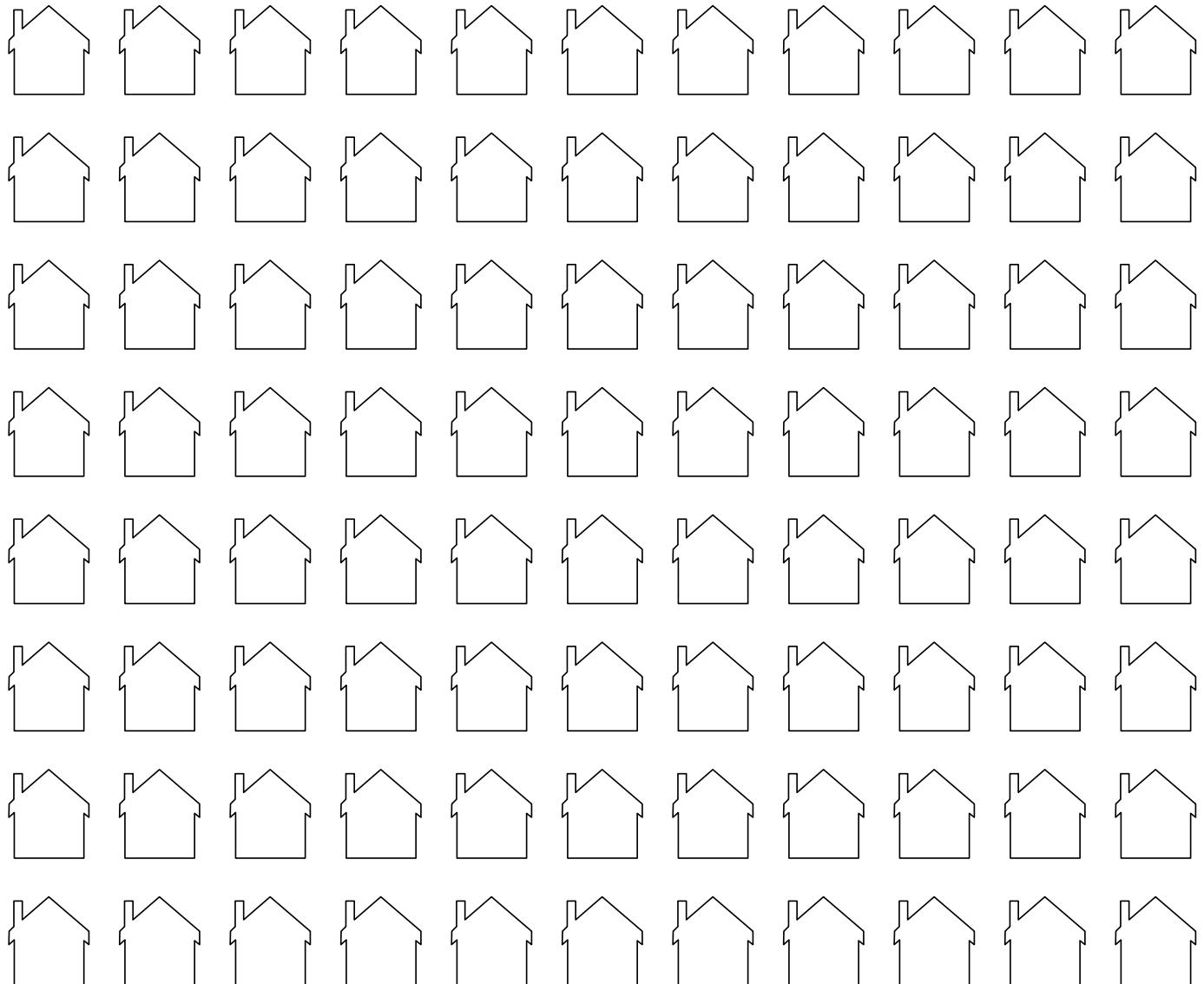
Notes:

Notes:

House Fund Tracker

Goal:

Each Icon:

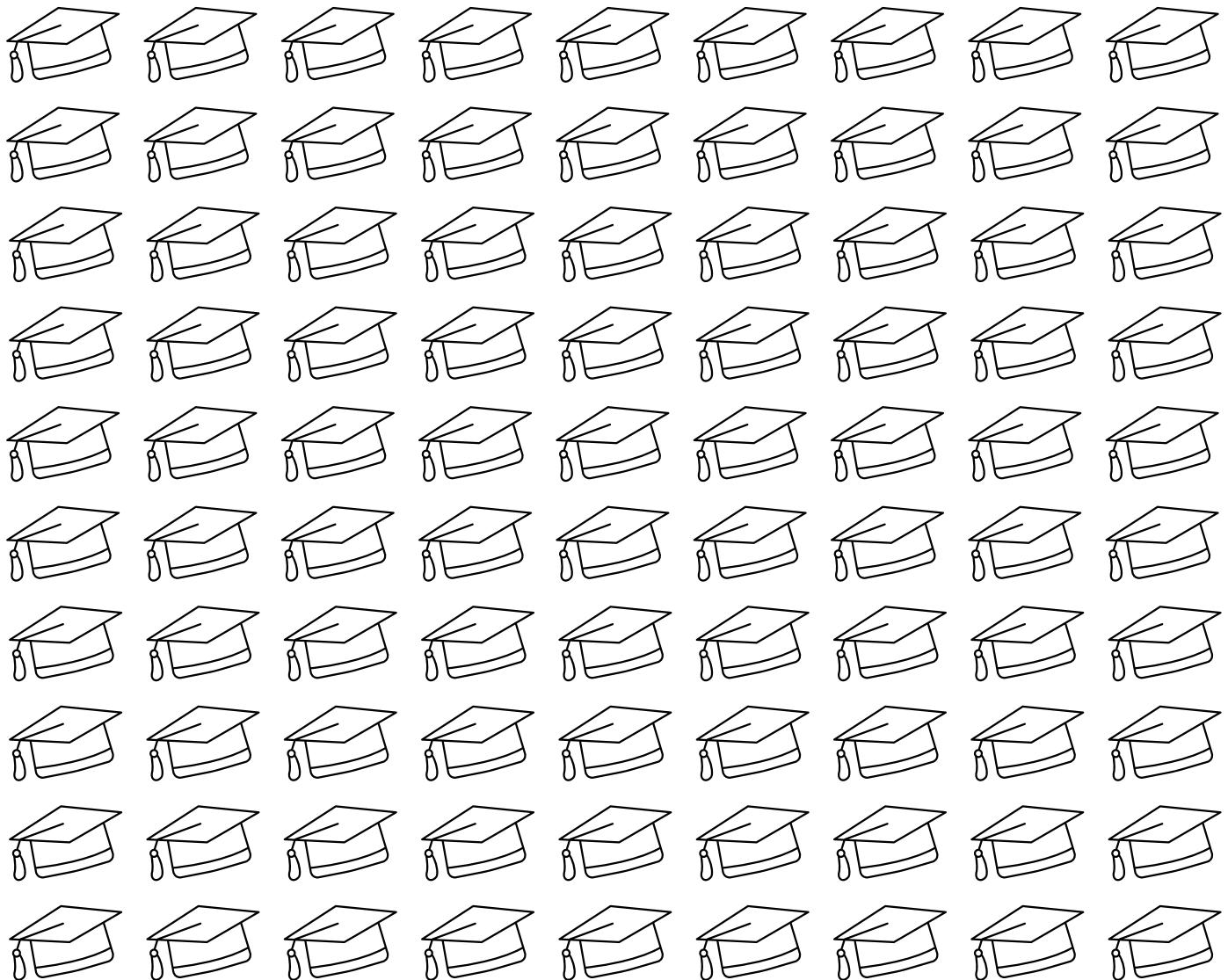


Notes:

College Fund Tracker

Goal:

Each Icon:

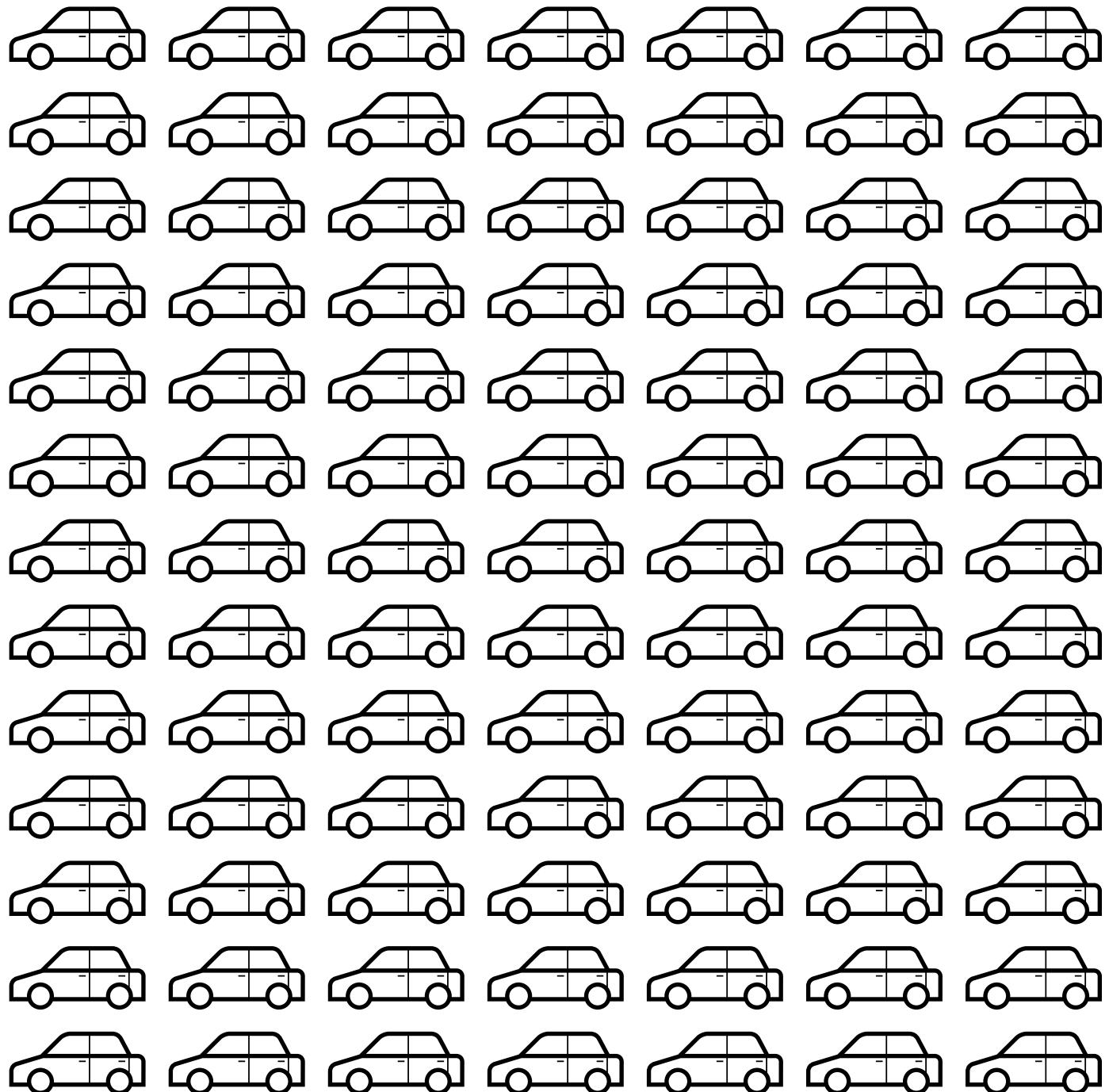


Notes:

Car Fund Tracker

Goal:

Each Icon:

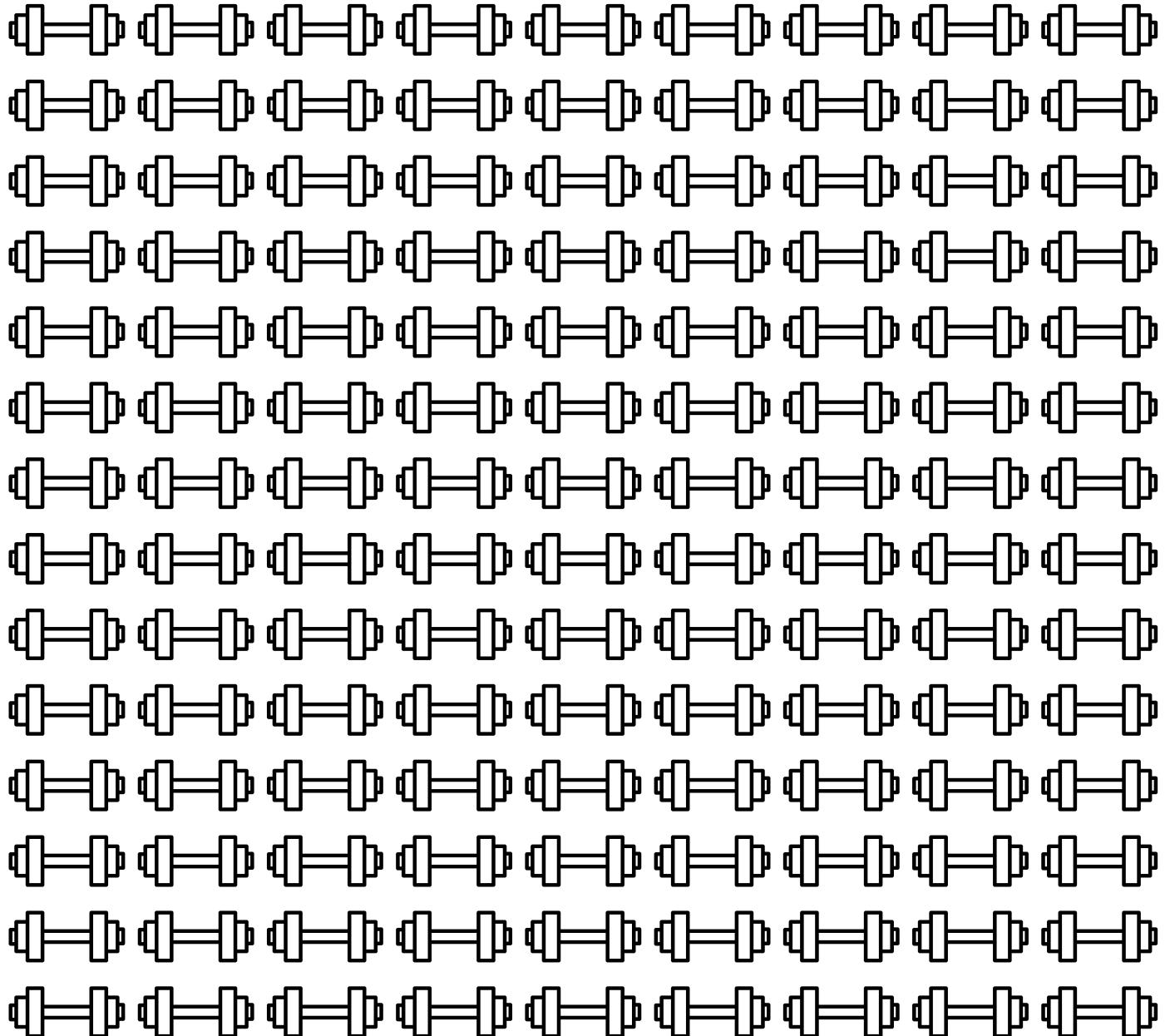


Notes:

GYM Fund Tracker

Goal:

Each Icon:

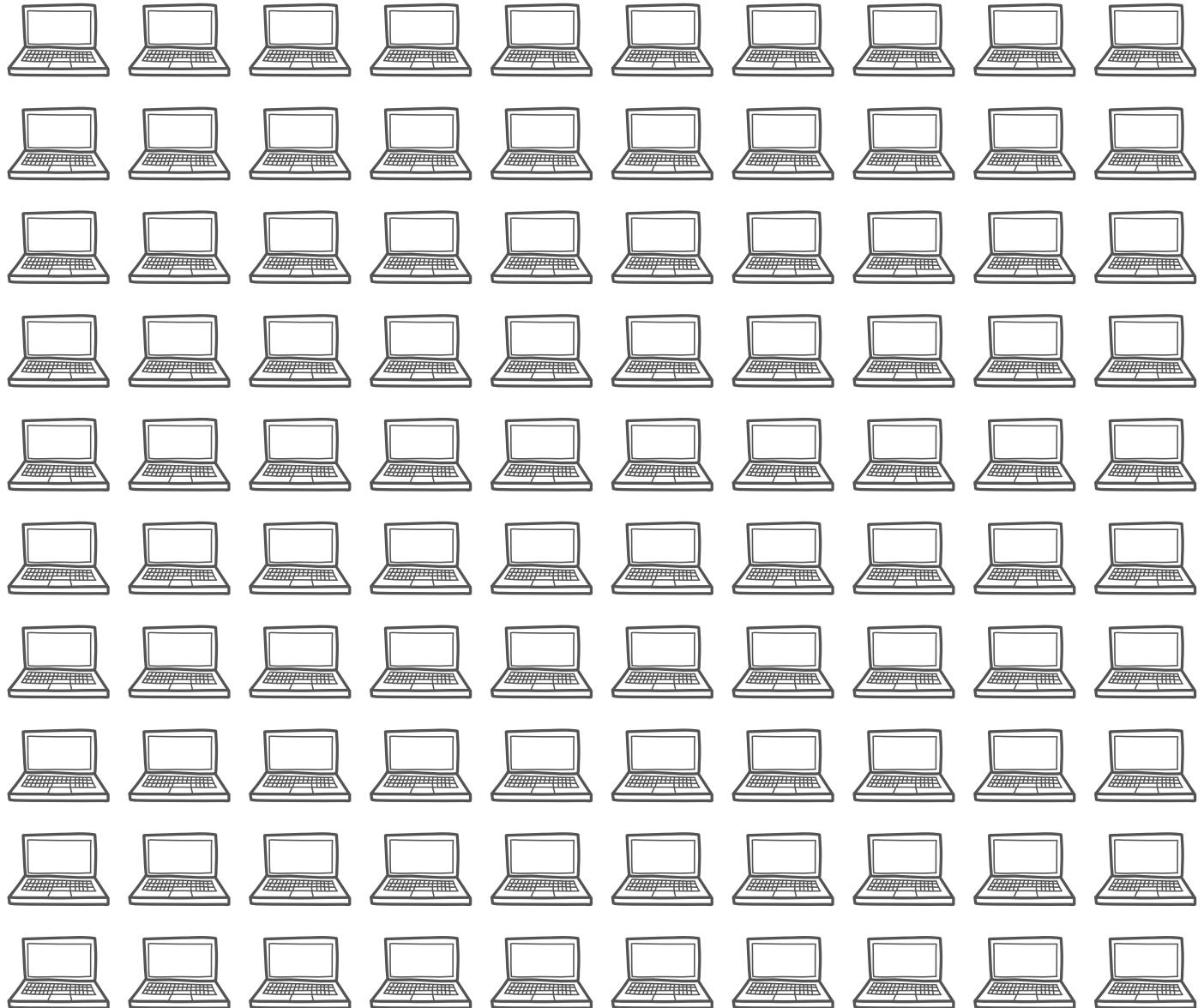


Notes:

New Laptop Fund Tracker

Goal:

Each Icon:

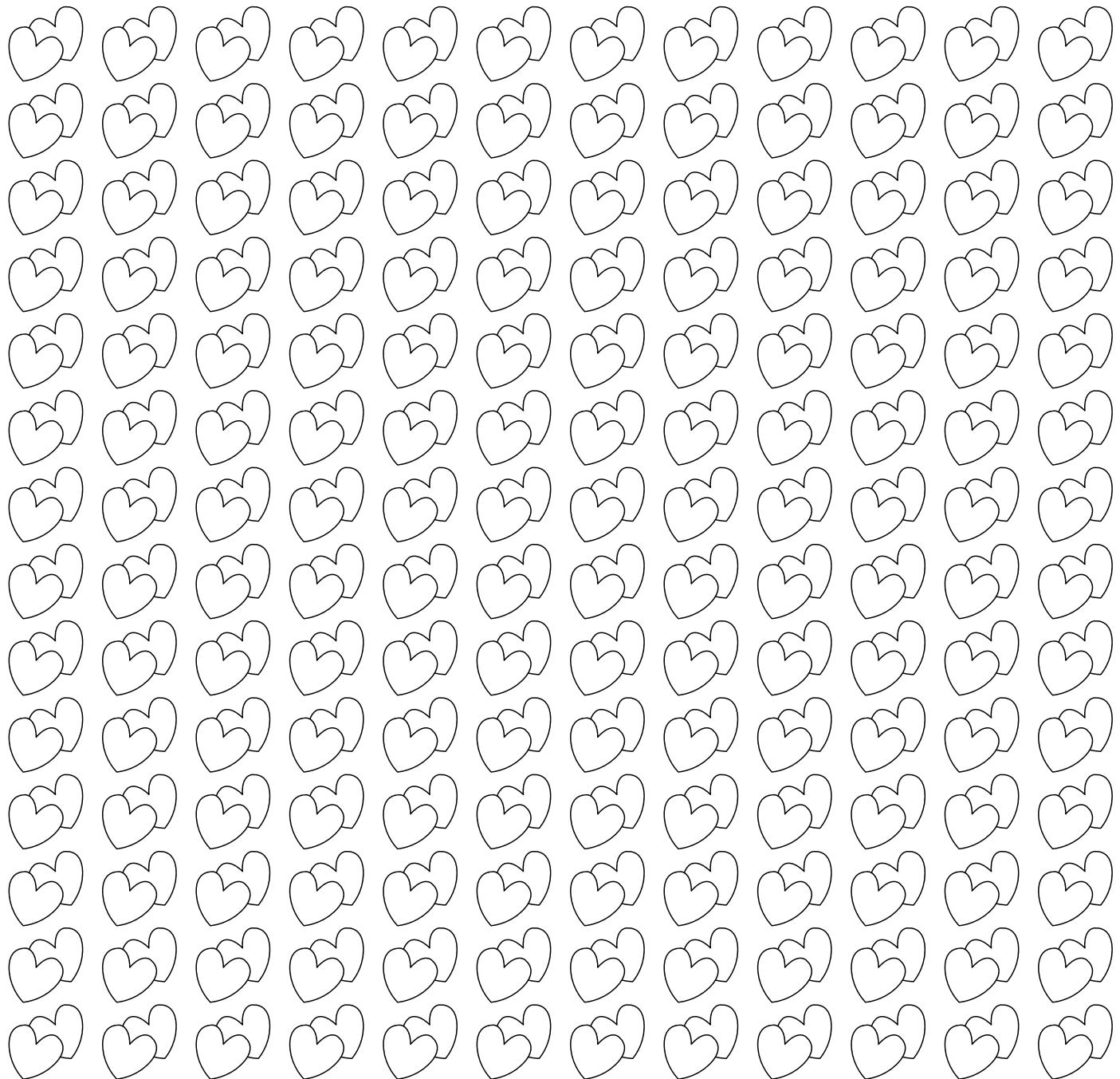


Notes:

Wedding Fund Tracker

Goal:

Each Icon:

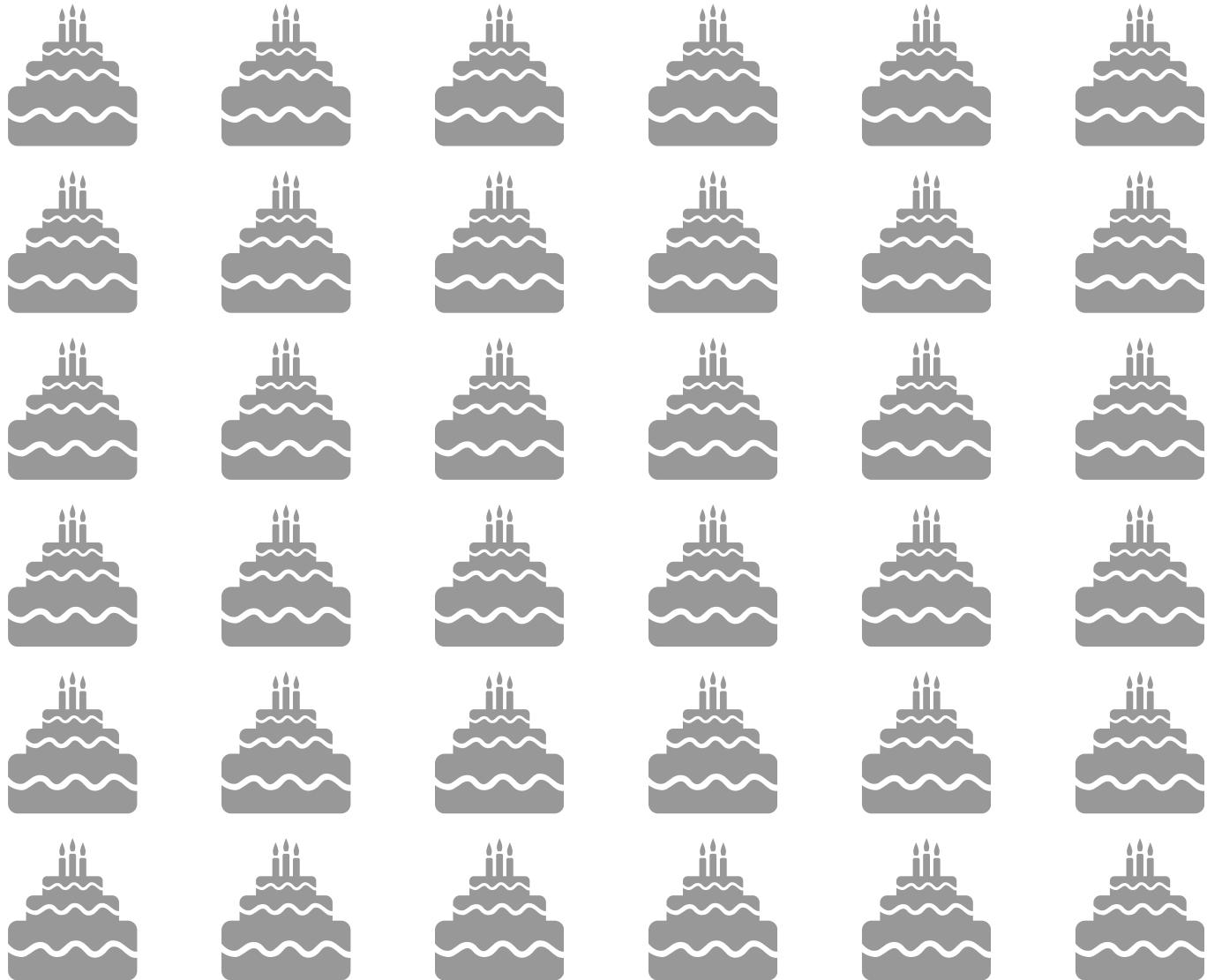


Notes:

Birthday Fund Tracker

Goal:

Each Icon:

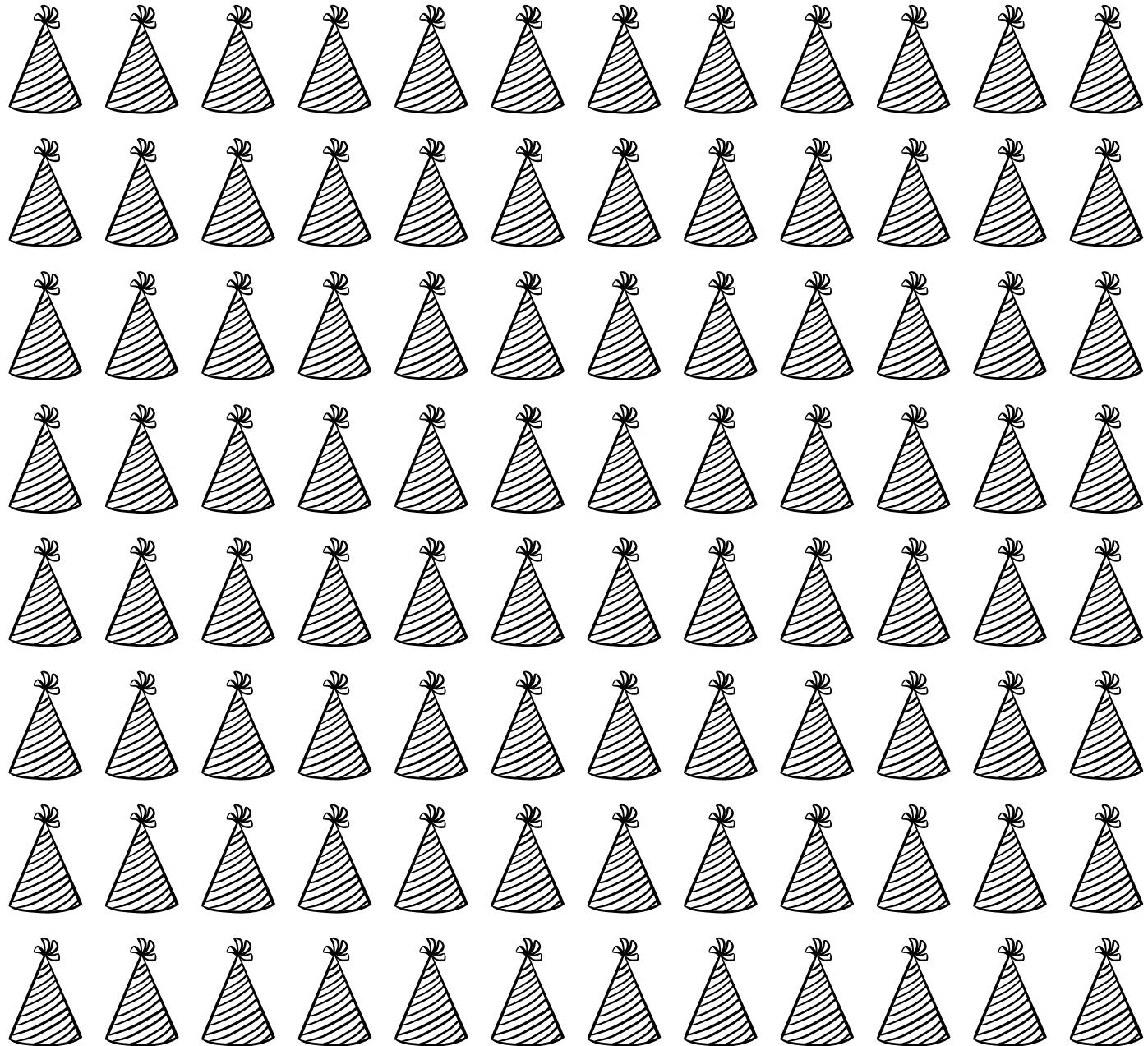


Notes:

Party Fund Tracker

Goal:

Each Icon:



Notes:

No Spend Month Tracker

Goal:

Each Icon:

1

2

3

4

5

6

8

9

10

11

12

13

15

16

17

18

19

20

22

23

24

25

26

27

29

30

31

No Buy List

Exemptions

Notes

EMERGENCY FUND

AMOUNT NEEDED:	TARGET DATE:									
MONTHLY SAVING TARGET:	ACCOUNT:									
PROGRESS	10%	20%	30%	40%	50%	60%	70%	80%	90%	

NOTES:

SINKING FUNDS

ITEM:

GOAL:

DATE	DEPOSITE	EXPENSE	TOTAL

ITEM:

GOAL:

DATE	DEPOSITE	EXPENSE	TOTAL

ITEM:

GOAL:

DATE	DEPOSITE	EXPENSE	TOTAL

ITEM:

GOAL:

DATE	DEPOSITE	EXPENSE	TOTAL

FUTURE GOALS

DATE FRAME	WHAT / VISION	HOW
1 YEAR		
2 YEAR		
3 YEAR		
4 YEAR		
5 YEAR		
6 YEAR		

NET WORTH TRACKER

MONTH:

TOTAL ASSETS:

NET WORTH:

YEAR:

TOTAL LIABILITIES:

ASSETS		LIABILITIES	
DESCRIPTION	VALUE	DESCRIPTION	VALUE
TOTAL		TOTAL	

NOTES

ANNUAL OVERVIEW

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

UPCOMING EXPENSES

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

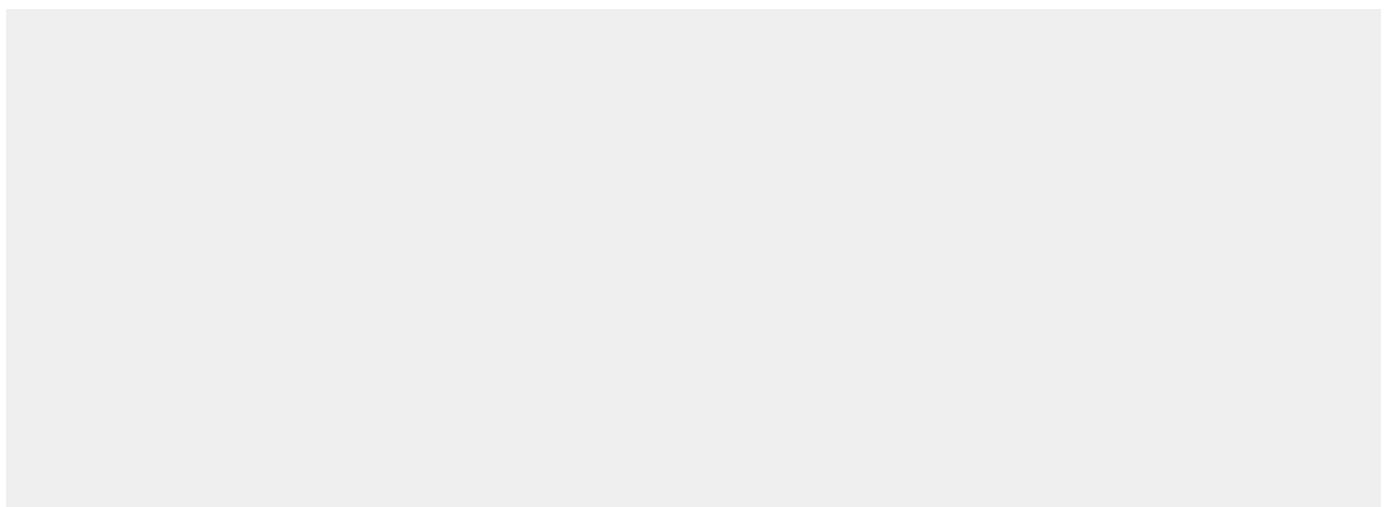
OCTOBER

NOVEMBER

DECEMBER

TODAY'S NOTES

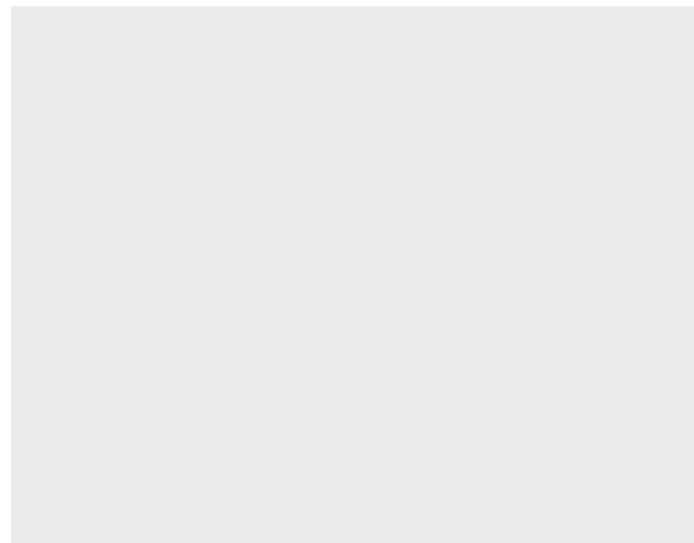
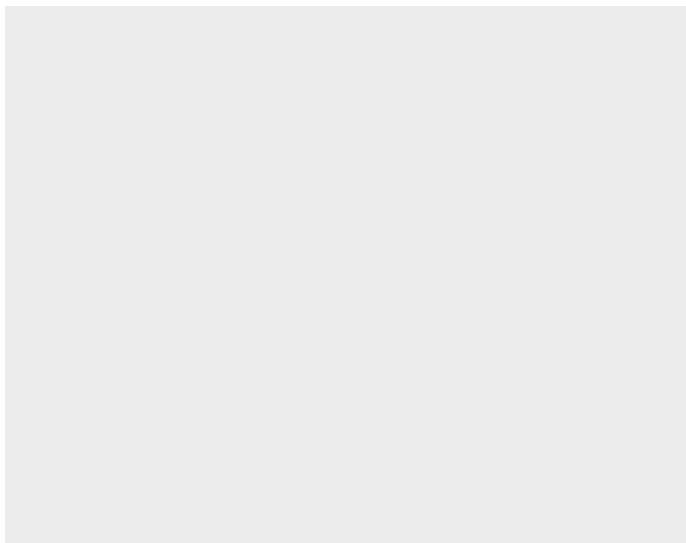
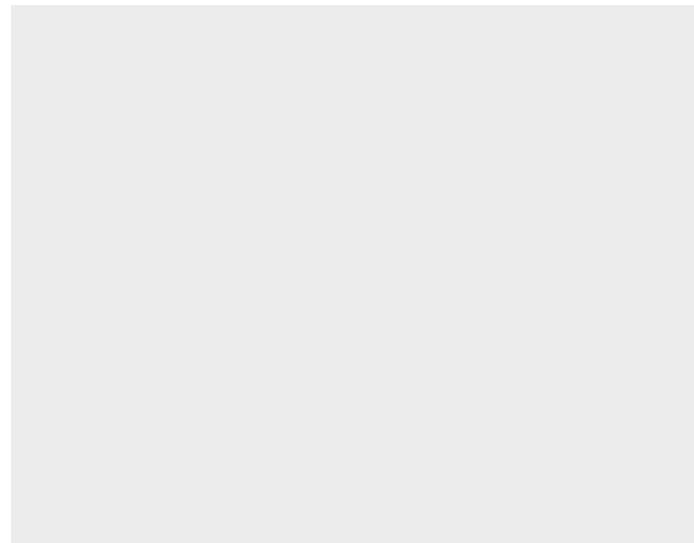
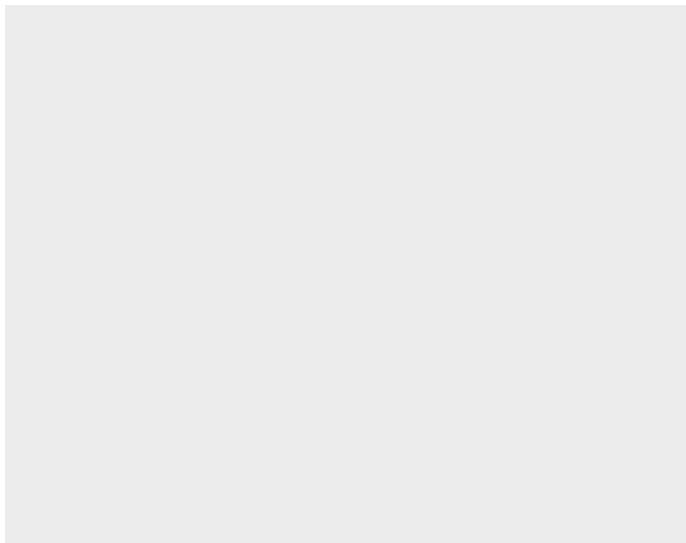
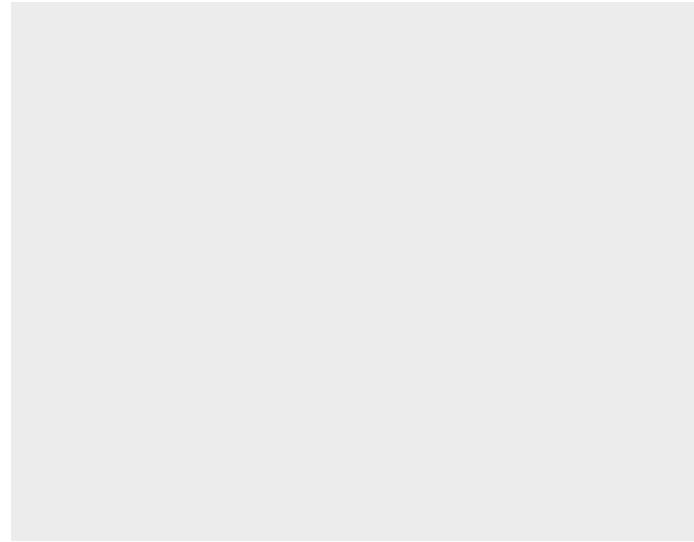
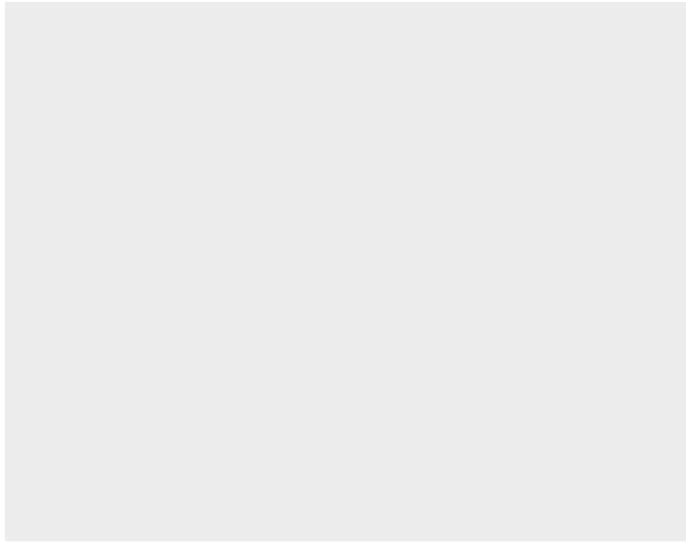
TODAY'S NOTES



TODAY'S NOTES

MY NOTES

IMPORTANT NOTES



NOTES