

# **BUDGET & FINANCIAL PLANNER**

**This Planner Belongs To**

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# 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:
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## INCOME

DATE	DESCRIPTION	AMOUNT	AFTER TAX

## FIXED EXPENSES

DATE	DESCRIPTION	AMOUNT
TOTAL		

## OTHER EXPENSES

DATE	DESCRIPTION	AMOUNT
TOTAL		

## RECAP

	GOAL	ACTUL	DIFFERENCE
EARN			
SPENT			
DEBT			
SAVED			

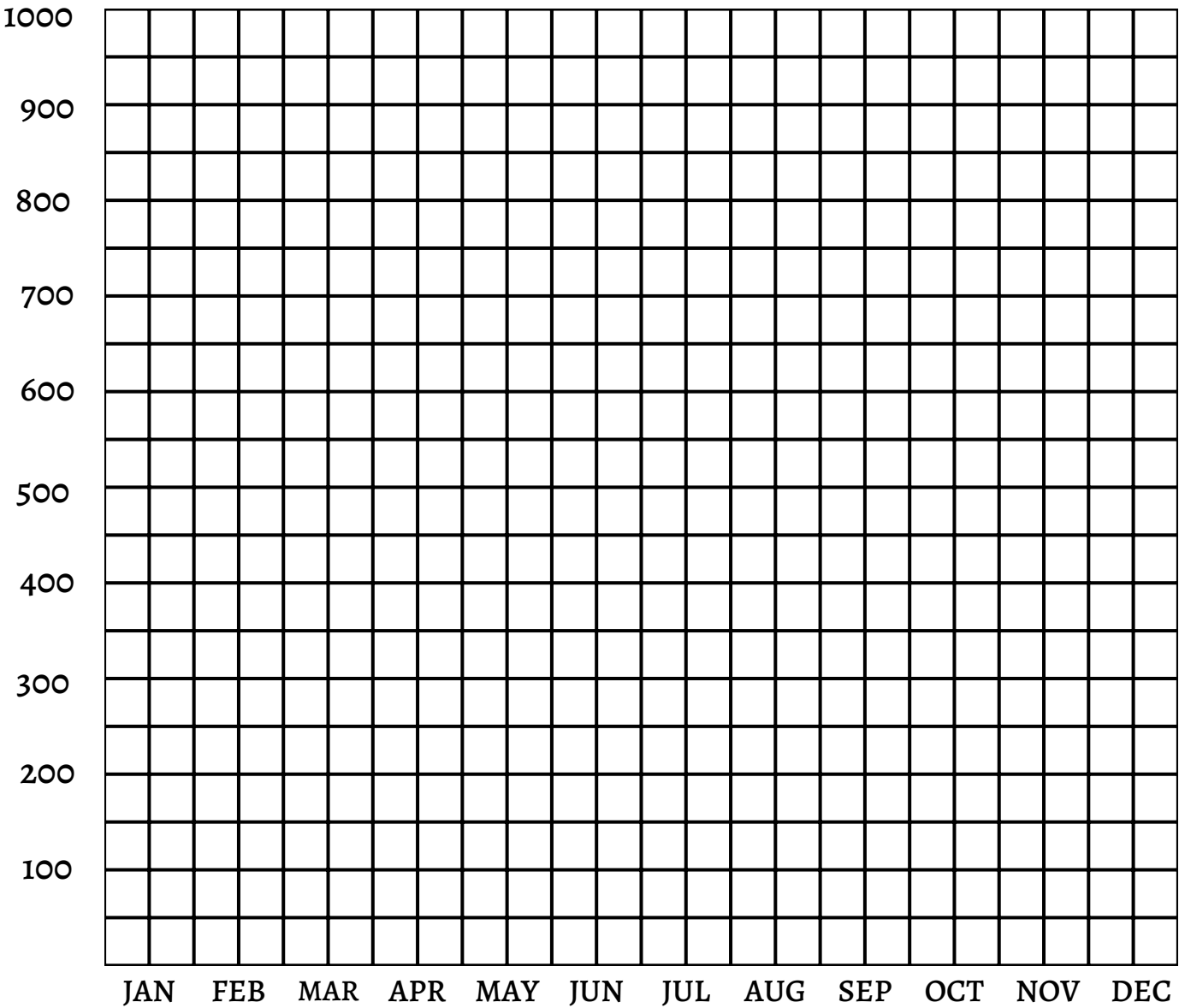
# ZERO BUDGET

MONTH/YEAR:

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

# CREDIT SCORE TRACKER

TOP FINANCIAL GOAL:	DATE:
CURRENT SCORE:	GOAL SCORE:



NOTES:	

# SPENDING TRACKER

[illegible]

# 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:

1

2

3

4

5

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11

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NUMBER OF SUCCESSFUL DAYS:

NUMBER OF UNSUCCESSFUL DAYS:

TOTAL SAVED AMOUNT:



# EXPENSES TRACKER

[illegible]

# PAYCHECK BUDGET

BUDGET GOAL:

TIME PERIOD:

SOURCES OF INCOME	BUDGET	ACTUAL
TOTAL		

EXPENSE	BUDGET	ACTUAL	DIFFERENCE	DATE/PAID
TOTAL				

SUMMARY	INCOME	EXPENSE	DIFFERENCE
ACTUAL			
BUDGET			

# YEARLY EXPENSES

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

# INCOME TRACKER

MONTH:

[illegible]

# BILL TRACKER

[illegible]

# BILL & SUBSCRIPTION TRACKER

BILL	DUE	AMOUNT	J	F	M	A	M	J	J	A	S	O	N	D
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## ANNUALY

DESCRIPTION	DUE	AMOUNT	ANNUAL RATE

# 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

[illegible]

# BUDGET LIST

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

# FINANCIAL CALENDAR

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

**NOTES:** \_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# FINANCIAL TRACKER

GOAL				\$	
START DATE			COMPLATE DATE		
PROGRESS	10%	25%	50%	75%	100%

GOAL				\$	
START DATE			COMPLATE DATE		
PROGRESS	10%	25%	50%	75%	100%

GOAL				\$	
START DATE			COMPLATE DATE		
PROGRESS	10%	25%	50%	75%	100%

GOAL				\$	
START DATE			COMPLATE DATE		
PROGRESS	10%	25%	50%	75%	100%

GOAL				\$	
START DATE			COMPLATE DATE		
PROGRESS	10%	25%	50%	75%	100%

GOAL				\$	
START DATE			COMPLATE DATE		
PROGRESS	10%	25%	50%	75%	100%

GOAL				\$	
START DATE			COMPLATE DATE		
PROGRESS	10%	25%	50%	75%	100%

GOAL				\$	
START DATE			COMPLATE DATE		
PROGRESS	10%	25%	50%	75%	100%

GOAL				\$	
START DATE			COMPLATE DATE		
PROGRESS	10%	25%	50%	75%	100%

# FINANCIAL SUMMARY

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

# TAX DEDUCTIONS

MONTH:

[illegible]

# DONATION TRACKER

[illegible]



# ANNUAL DONATION LOG

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

# SALES TRACKER

[illegible]

# BILLING ACCOUNTS

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

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

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

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

SAVING FOR:

SAVING GOAL:

MINIMUM SAVING:

GOAL MONTHLY SAVING:

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

[illegible]

# SAVING JAR TRACKER



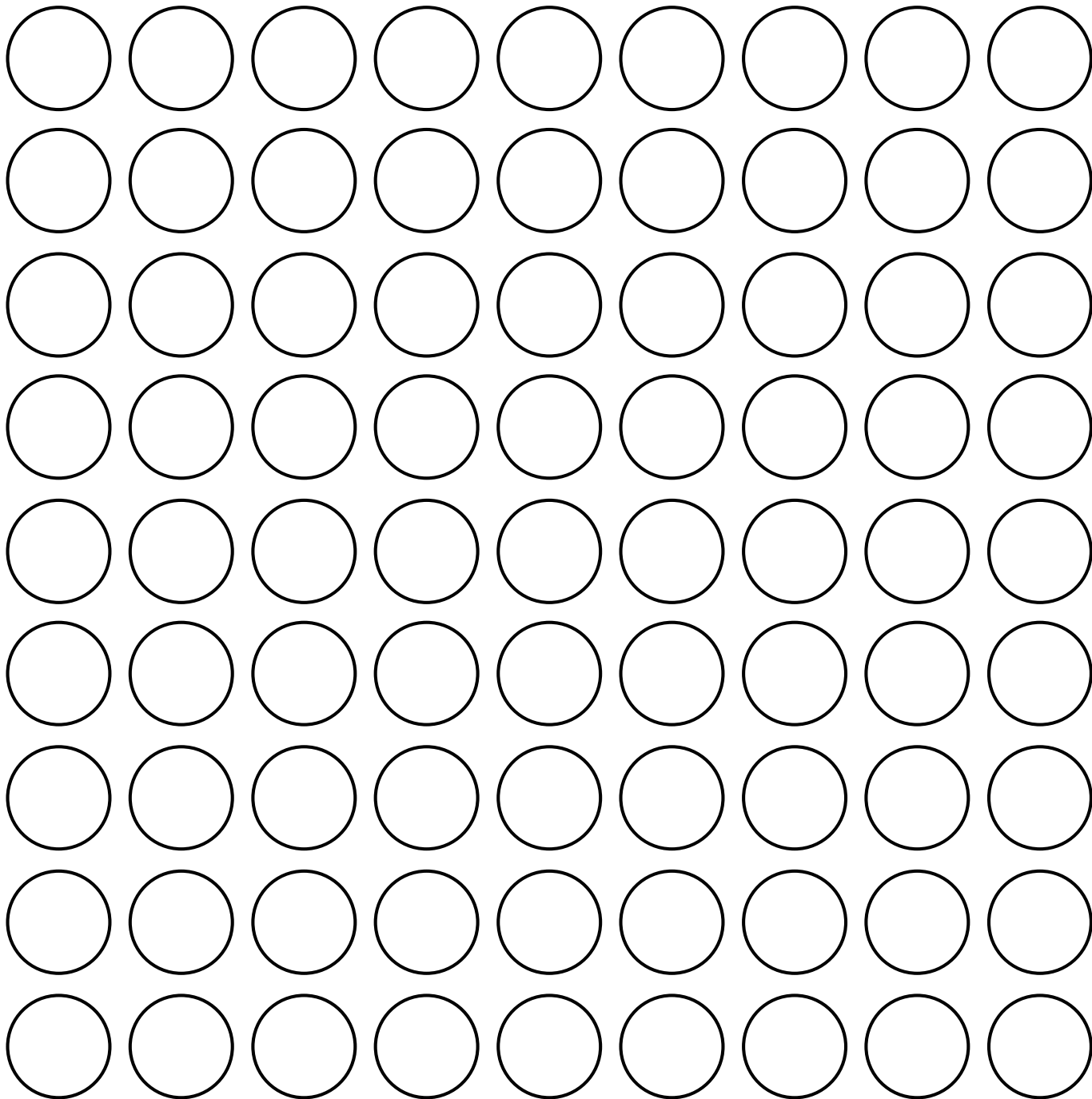
**GOAL AMOUNT:** \_\_\_\_\_

= \_\_\_\_\_

# Emergency Fund Tracker

**Goal:**

**Each Icon:**



**Notes:**



# 3-6 Months Emergency Fund Tracker

**Goal:**



**Notes:**

**Goal:**



**Notes:**

**Goal:**



**Notes:**

**Goal:**



**Notes:**

**Goal:**



**Notes:**

**Goal:**

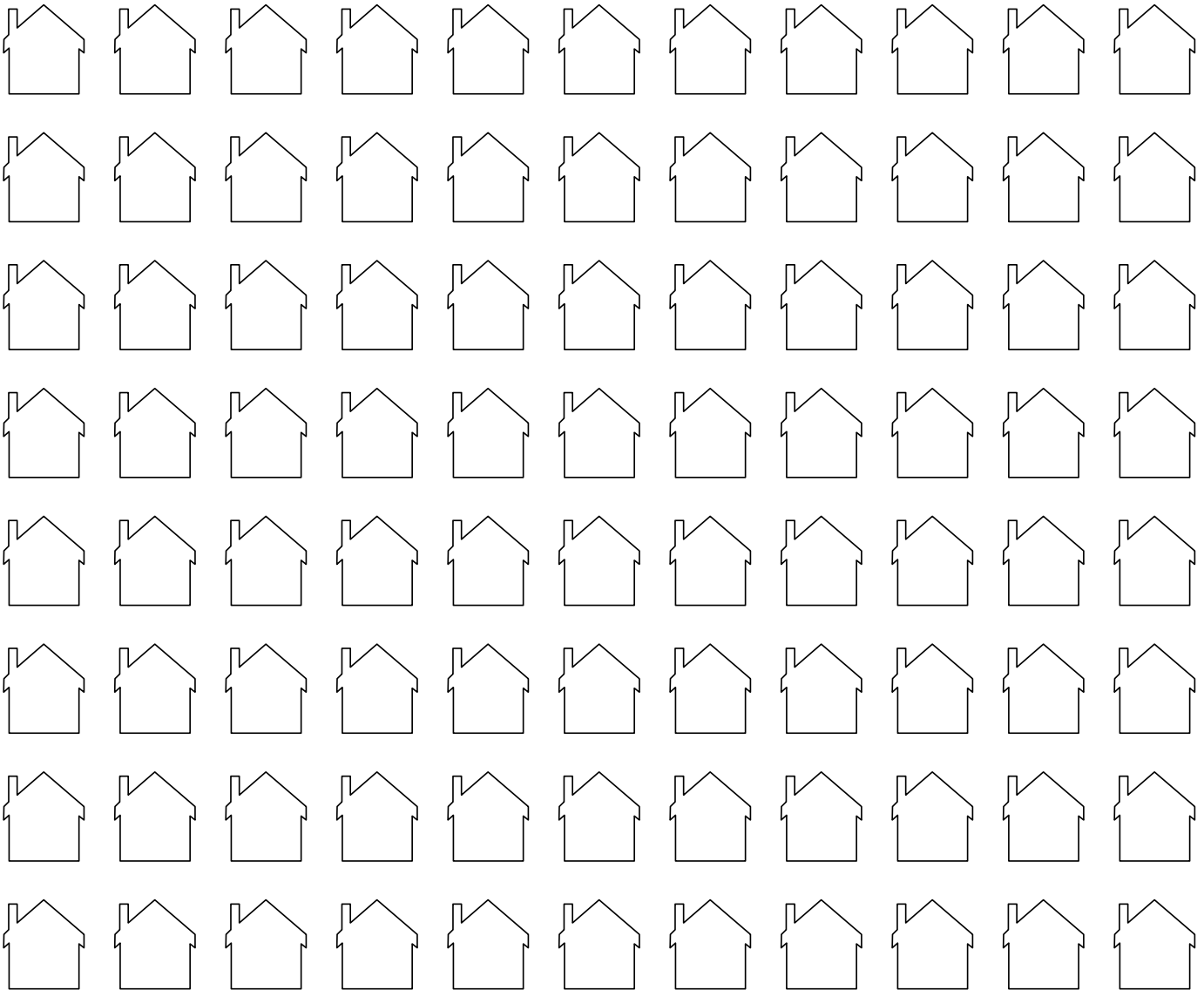


**Notes:**

# House Fund Tracker

**Goal:**

**Each Icon:**

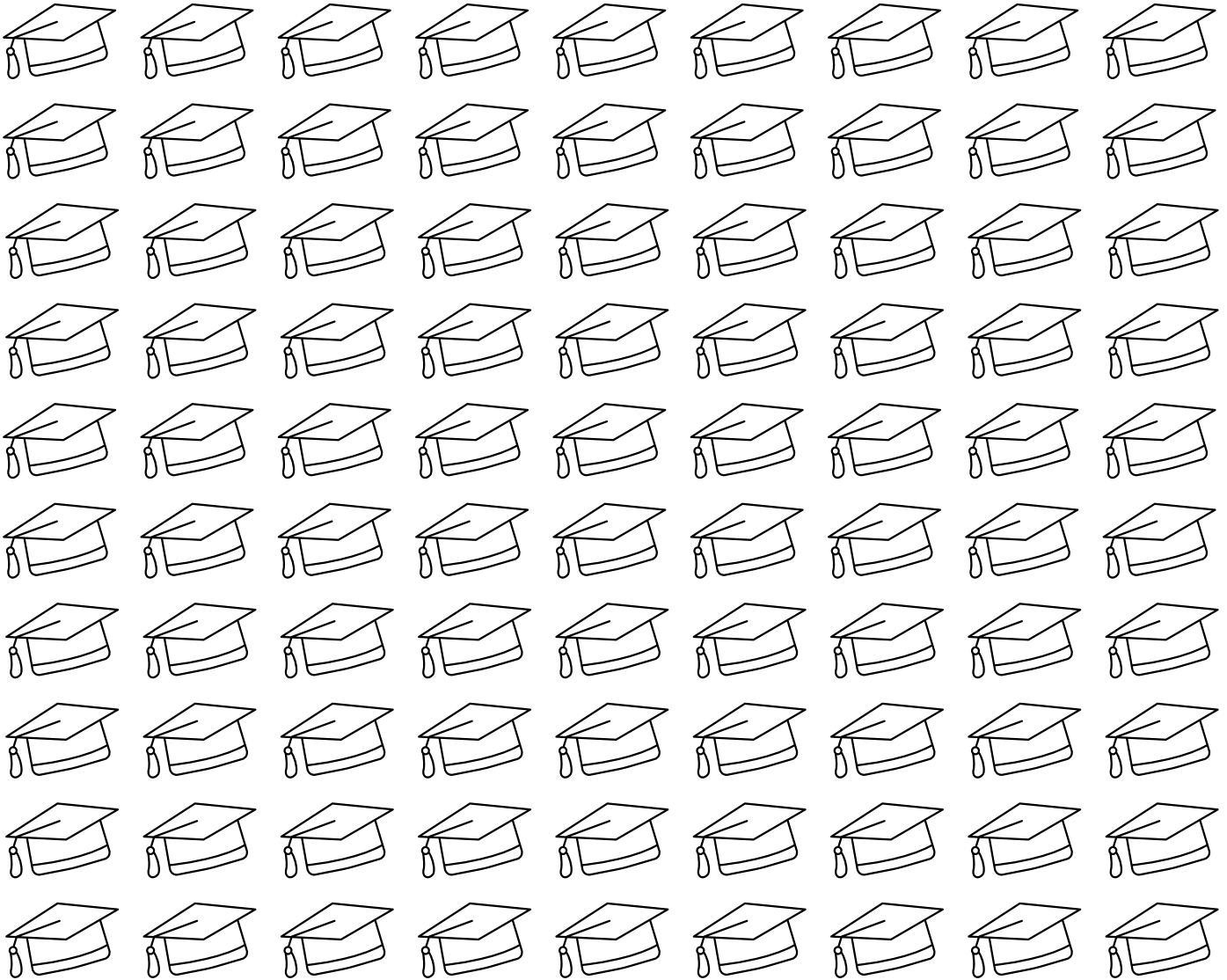


**Notes:**

# College Fund Tracker

**Goal:**

**Each Icon:**

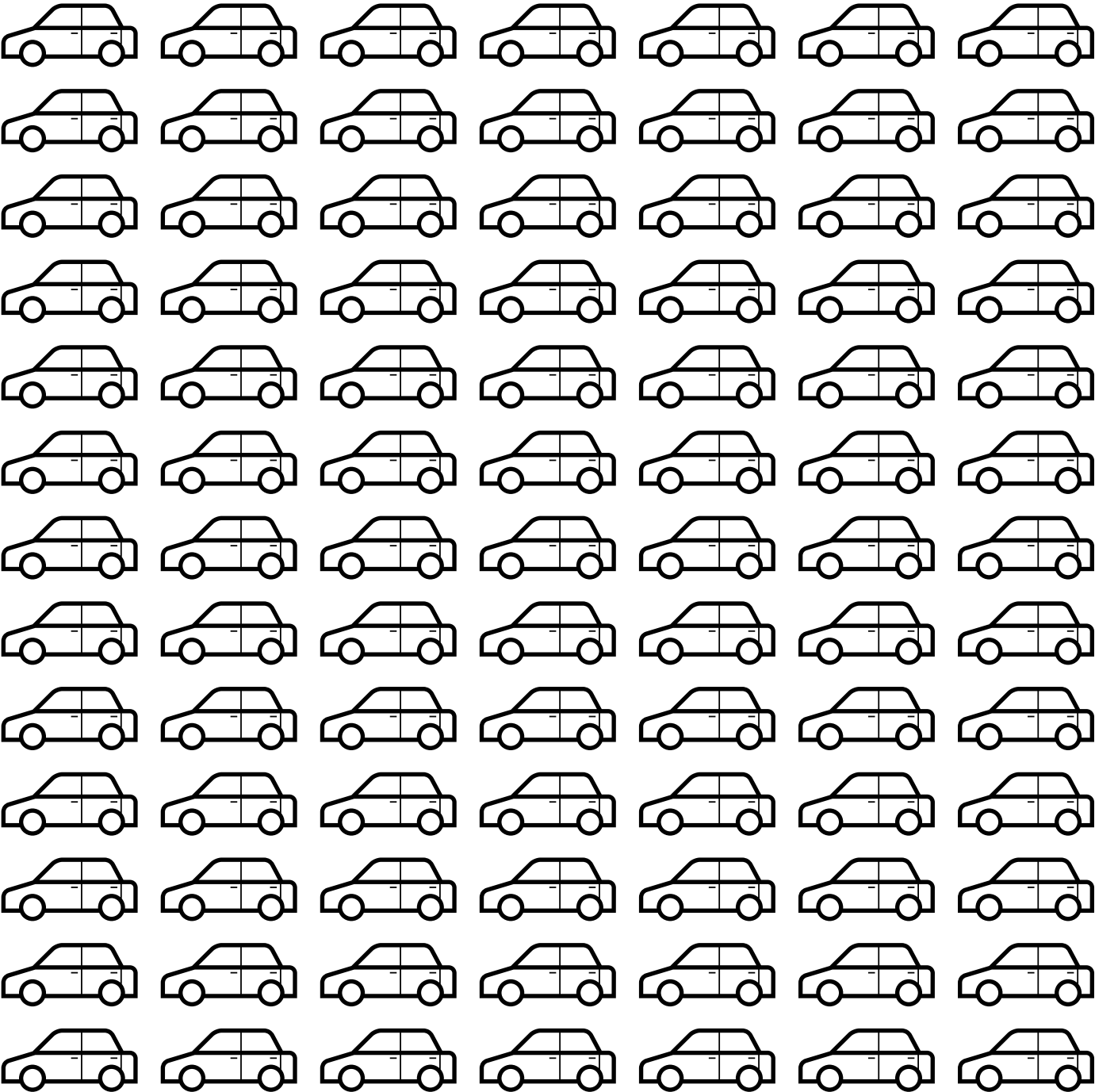


**Notes:**

# Car Fund Tracker

**Goal:**

**Each Icon:**

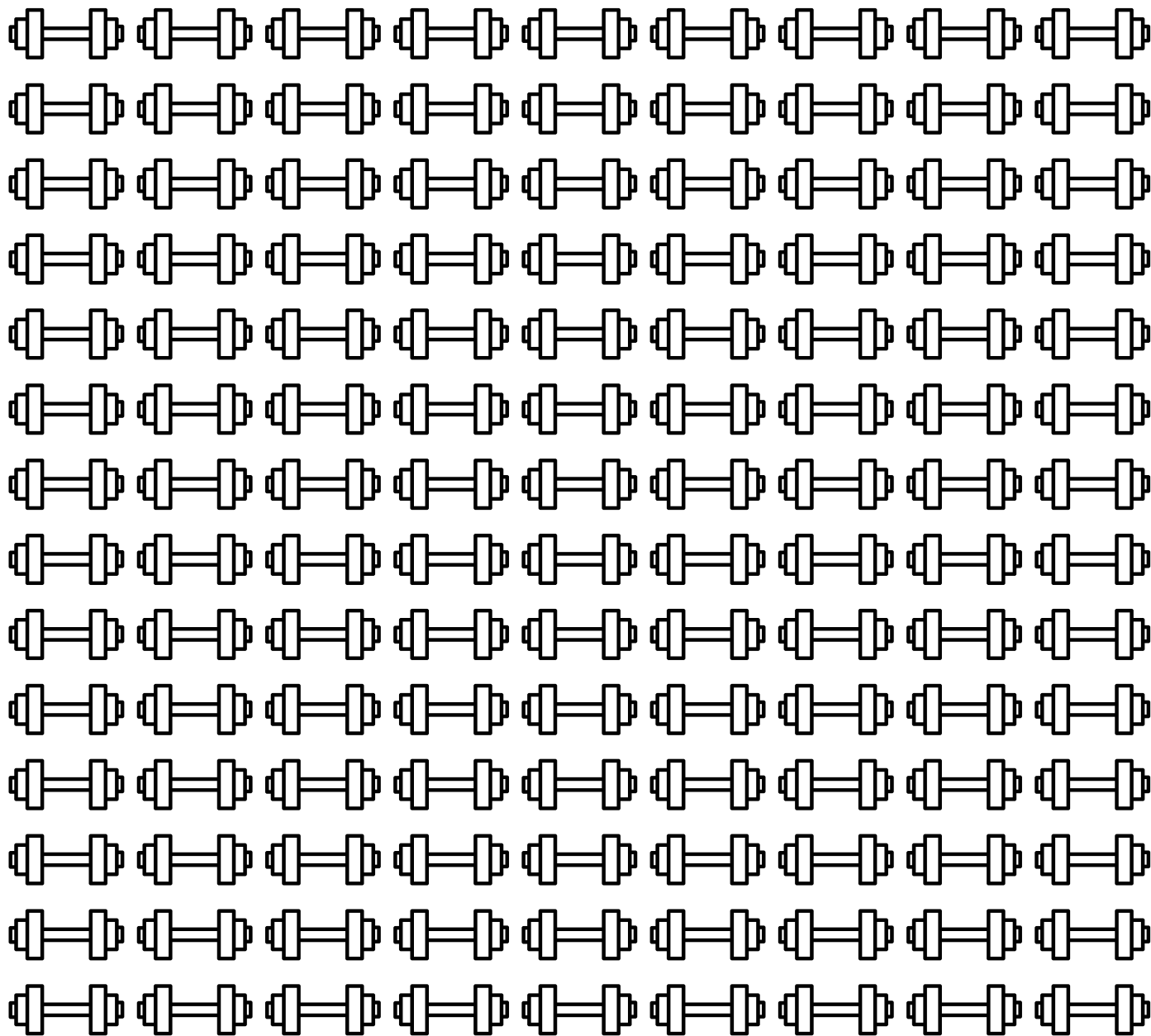


**Notes:**

# GYM Fund Tracker

**Goal:**

**Each Icon:**

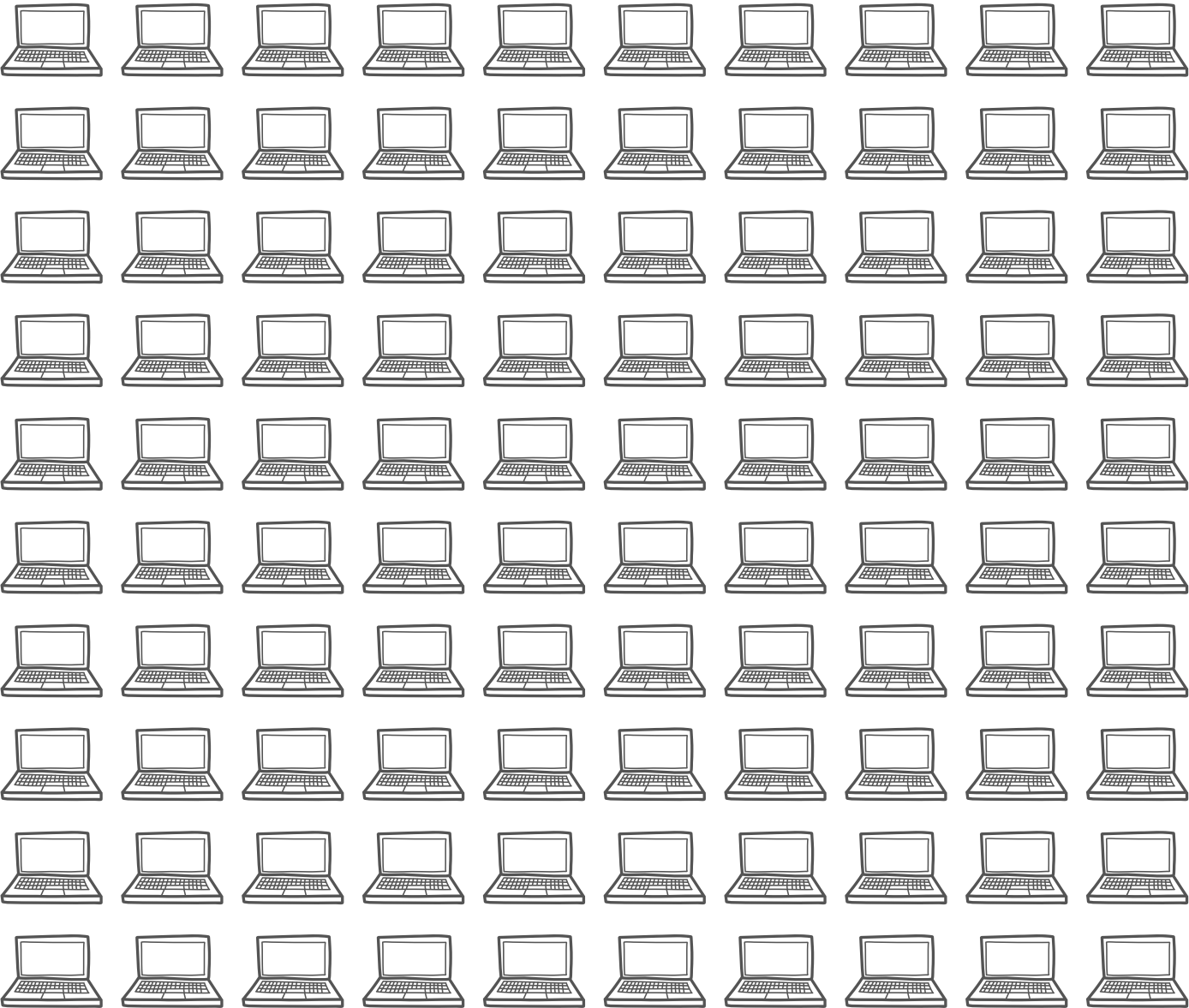


**Notes:**

# New Laptop Fund Tracker

**Goal:**

**Each Icon:**

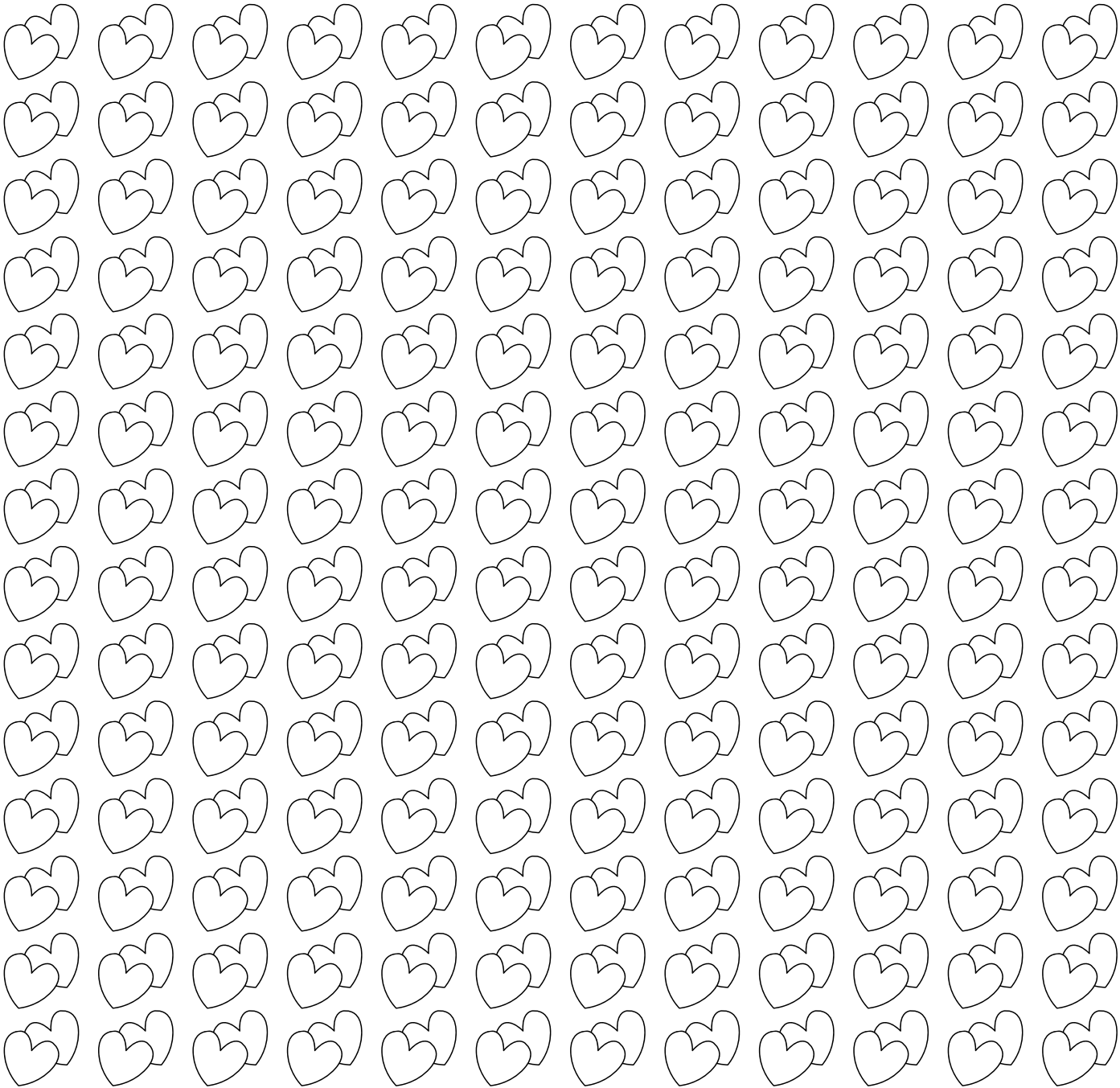


**Notes:**

# Wedding Fund Tracker

**Goal:**

**Each Icon:**



**Notes:**

# Birthday Fund Tracker

**Goal:**

**Each Icon:**



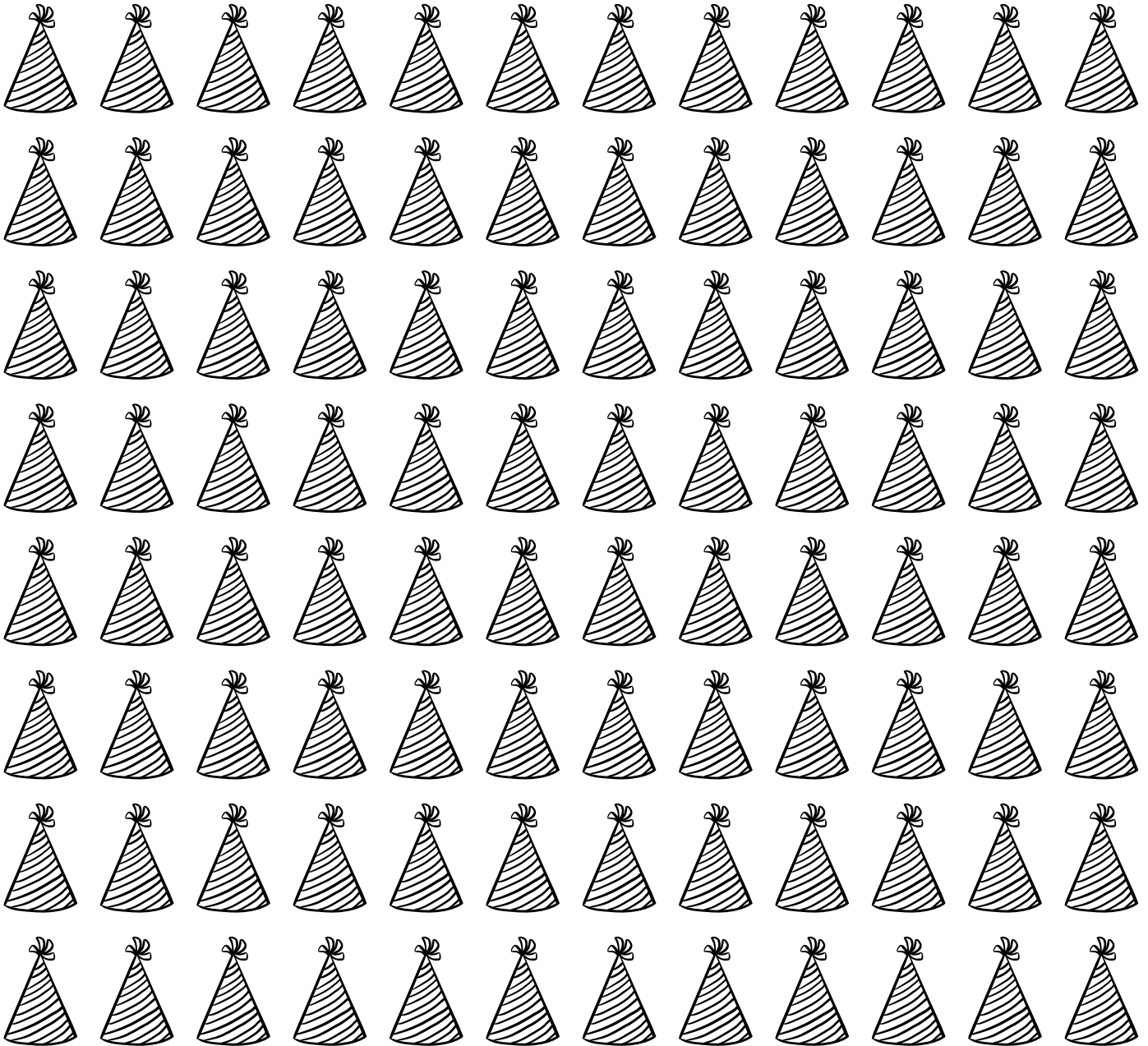
**Notes:**



# 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%	
----------	-----	-----	-----	-----	-----	-----	-----	-----	-----	--

DATE	DEPOSITED	WITHDRAWN	NOTES	BALANCE

NOTES:

# SINKING FUNDS

ITEM:

GOAL:

DATE	DEPOSIT	EXPENSE	TOTAL

ITEM:

GOAL:

DATE	DEPOSIT	EXPENSE	TOTAL

ITEM:

GOAL:

DATE	DEPOSIT	EXPENSE	TOTAL

ITEM:

GOAL:

DATE	DEPOSIT	EXPENSE	TOTAL

# FUTURE GOALS

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

# NET WORTH TRACKER

MONTH:

TOTAL ASSETS:

NET WORTH:

YEAR:

TOTAL LIABILITIES:

## ASSETS

DESCRIPTION

VALUE

## LIABILITIES

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



## This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

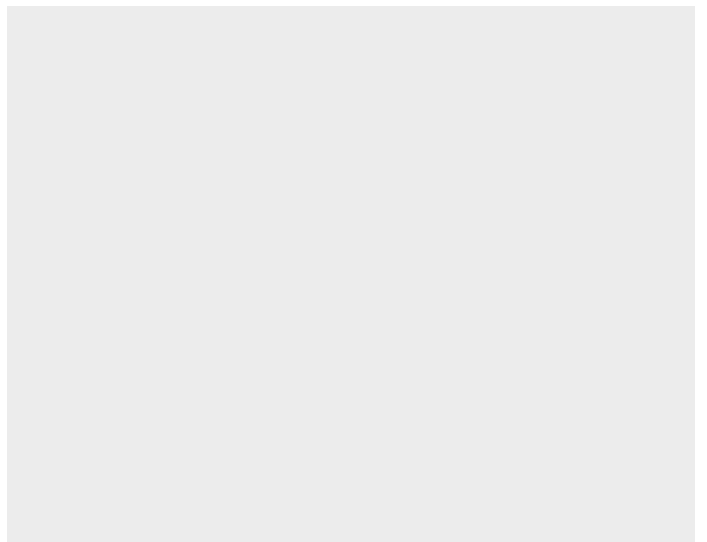
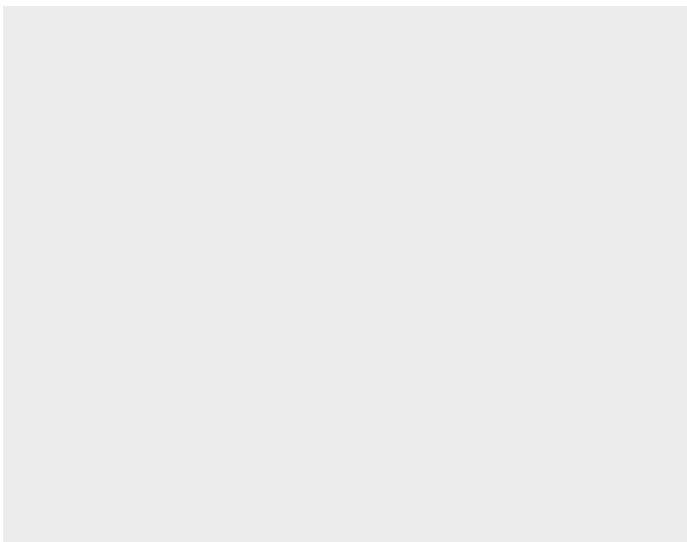
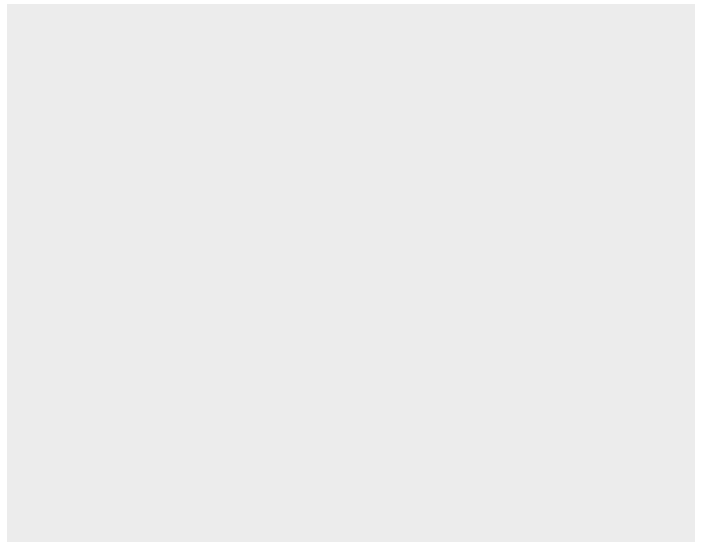
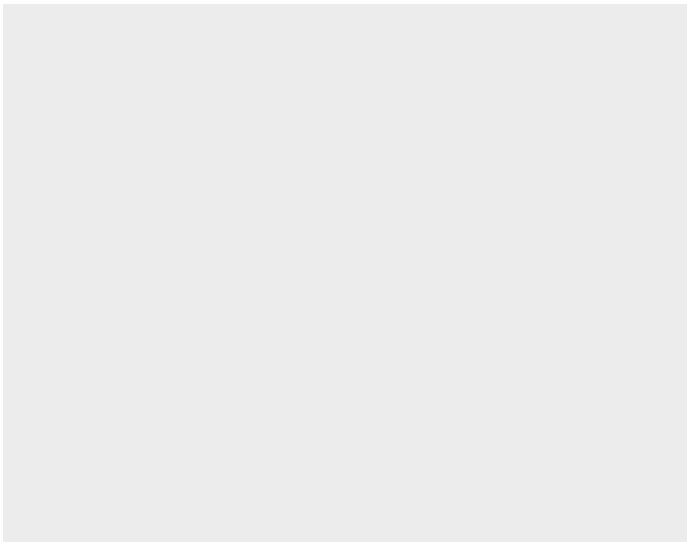
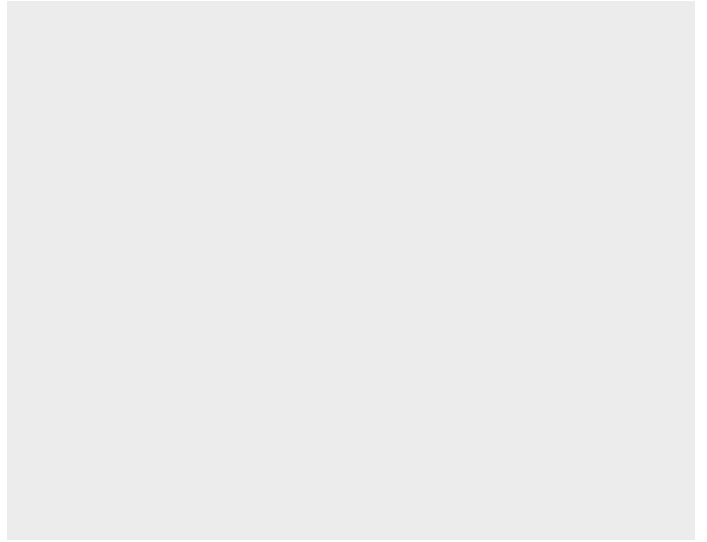
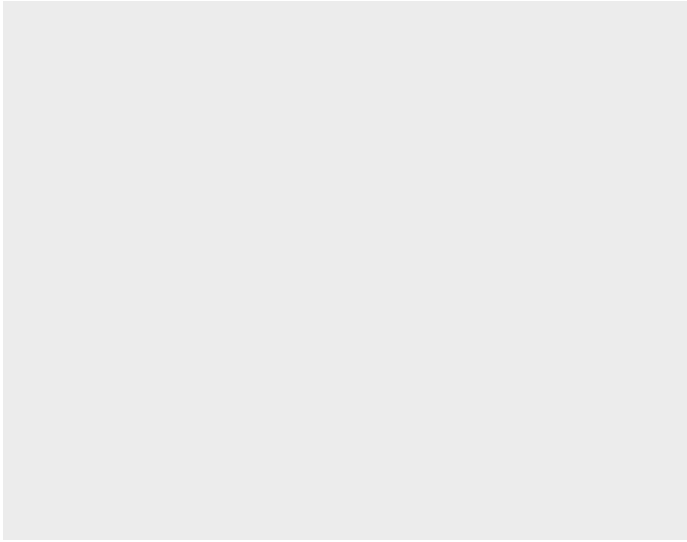
## This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

# TODAY'S NOTES

[illegible]

[illegible]

# IMPORTANT NOTES



# NOTES

This image shows a blank sheet of white paper with horizontal dashed lines. The lines are evenly spaced and run across the width of the page, providing a guide for handwriting or typing. There are no margins, text, or other markings on the page.