BUDGET PLANNER

Annual Financial Goals

Quarterly Financial Goals

Monthly Budget Overview

Budget Tracker

Debt Payment Tracker

Credit Card Payment Plan

Annual Financial Overview

Financial Calendar

Income Tracker

Expenses Tracker

Savings Tracker

No-Spend Challenge

Bank Account Information

Credit Card Information

FINANCIAL GOALS For the Year

List up to 5 financial goals for the year. For each, set a specific target, outline key action steps, and write down the reward if achieved.

GOAL 1:	ACTION STEPS
	1
MEASURABLE TARGET:	2)
REWARD:	3
GOAL 2:	ACTION STEPS
	1
MEASURABLE TARGET:	2)
REWARD:	3
GOAL 3:	ACTION STEPS
	1
MEASURABLE TARGET:	2
REWARD:	3
GOAL 4:	ACTION STEPS
	1
MEASURABLE TARGET:	2
REWARD:	3
GOAL 5:	ACTION STEPS
	1
MEASURABLE TARGET:	2
REWARD:	3

Q1 FINANCIAL G@ALS

GOALS	MEASURABLE TARGETS
1	
2	
(3)	
4	

	JAN	FEB	MAR		
10	1	1	1		
FOCUS	2	2	2		
ш	3	3	3		
PS					
N STE					
ACTION STEPS					
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REVIE					
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PERFORMANCE REVIEW					
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Q2 FINANCIAL G@ALS

GOALS	MEASURABLE TARGETS
1	
2	
3	⊕
4	

	APR	MAY	JUN		
ω.	1	1	1		
FOCUS	2	2	2		
ш.	3	3	3		
PS					
N STE					
ACTION STEPS					
∢					
>					
REVIE					
NCE					
ORMA					
PERFORMANCE REVIEW					
<u></u>					

Q3 FINANCIAL G@ALS

GOALS	MEASURABLE TARGETS
1	
2	
3	
4	

	JUL	AUG	SEP
	1	1	1
FOCUS	2	2	2
ŭ.	3	3	3
:PS			
N STE			
ACTION STEPS			
IEW			
E REV			
IANCI			
PERFORMANCE REVIEW			
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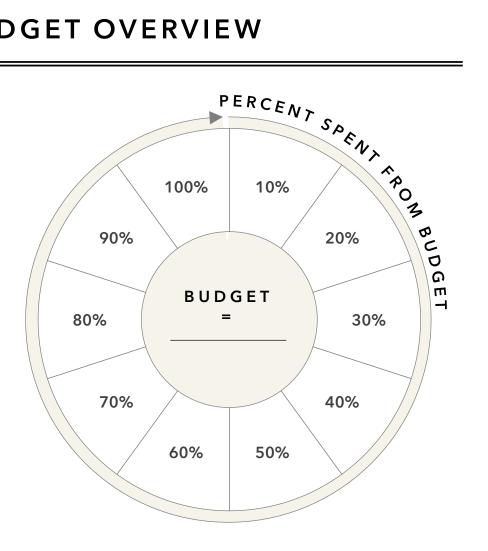
Q4 FINANCIAL G@ALS

GOALS	MEASURABLE TARGETS
1	
2	
3	•
4	•

	ОСТ	NOV	DEC		
S	1	1	1		
FOCUS	2	2	2		
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ACTION STEPS					
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ORMA					
PERFORMANCE REVIEW					
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MONTHLY BUDGET OVERVIEW

~	MONTH OF:
	JAN
	FEB
	MAR
	APR
	MAY
	JUN
	JUL
	AUG
	SEP
	ОСТ
	NOV
	DEC



CATERGORY	AMOUNT	%
NOTES		

BUDGET TRACKER

JAN FEB MAR APR MAY	JUN	JUL	AUG	SEP	OCT NO	OV DEC	
BUDGET FOR THE MONTH					BILLS		
DODGETT OR THE MICHTI		Item		Due	Budget	Actual	
FINANCIAL OVERVIEW							
START BALANCE							
INCOME							
SAVINGS				EXPENS	ES		
BILLS & EXPENSES		ltem		Date	Budget	Actual	
DEBT							
END BALANCE							
INCOME							
SALARY 1							
SALARY 2							
BONUS							
OTHERS							
TOTAL INCOME							
NOTES							
		ltem		DEBT Due	Budget	Actual	
		itein		Due	budget	Actual	

DEBT PAYMENT TRACKER



100%	ACCOUNT NO.		CREDITOR	
-	INTEREST RATE	E DATE	DUE D	AMOUNT
90%	PAYMENT	MINIMUI		GOAL PAYOFF DATE
80%	BALANCE	AMOUNT		DATE
70%				
60%				
50%				
40%				
30%				
20%				
10%				NOTES:
0%				

CREDIT CARD PAYMENT PLAN

ſ			_
	_	-	

Card Name:	Account No:
Credit Limit:	Interest Rate:
Starting Balance:	Payment Due Date:

DATE	MINIMUM PAYMENT DUE	AMOUNT PAID	REMAINING BALANCE	NOTES

ANNUAL FINANCIAL OVERVIEW



YEAR			BEGINNING	BEGINNING NETWORTH			
STARTING DEBT BALANCE STARTING SAVINGS BALANCE			DEBT PAYOFF GOAL				
			SAVINGS G	OAL			
INCOME (GOAL		INVESTMEN	INVESTMENT GOAL			
	INCOME	EXPENSES	DEBT PAID	SAVIGS	INVESTMENTS		
JAN							
FEB							
MAR							
APR							
MAY							
JUN							
JUL							
AUG							
SEP							
ОСТ							
NOV							
DEC							
TOTAL							
NOTES							

FINANCIAL CALENDAR



JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

TOP 3 FINANCIAL GOALS THIS MONTH	✓
1	
(2)	
(3)	

MON	TUE	WED	THU	FRI	SAT	SUN

INCOME TRACKER



DATE	SOURCE	DESCRIPTION	AMOUNT
		TOTAL	
NOTES			

EXPENSE TRACKER



CATEGORY	BUDGET	TOTAL SPENT	OVER/UNDER BUDGET
1.			
2.			
3.			
4.			
5.			
TOTAL			

Date	Description	Category	Amount
		TOTAL EXPENSES	

\$AVINGS TRACKER

SAVING FOR:	75%
GOAL AMOUNT:	50%
STARTING BALANCE:	25%
END BALANCE:	

DATE	SOURCE OF SAVINGS	AMOUNT SAVED	RUNNING BALANCE
	TOTAL		

NO-\$PEND CHALLENGE



JAN **FEB** MAR **APR** MAY JUN JUL AUG SEP OCT NOV **DEC** I'M SAVING FOR: STARTING BALANCE **RUNNING BALANCE GOAL AMOUNT** MON TUE **WED** THU FRI **SAT** SUN NOTES

BANK ACCOUNT INFO



Account Name:					
Account Type:		Bank Name:			
Account No:		Credit Limit:			
Routing No:		Phone No:			
Card No:		Address:			
Expiration Date:		Username:			
PIN:	CVV:	Password:			
Account Name:					
Account Type:		Bank Name:			
Account No:		Credit Limit:			
Routing No:		Phone No:			
Card No:		Address:			
Expiration Date:		Username:			
PIN:	CVV:	Password:			
Account Name:					
Account Type:		Bank Name:			
Account No:		Credit Limit:			
Routing No:		Phone No:			
Card No:		Address:			
Expiration Date:		Username:			
PIN:	CVV:	Password:			

CREDIT CARD INFO

	Bank: Card No: Security Code: Card Network:		Due Date:	==
			Expiration Date:	
			Phone No:	
			Address:	
	Credit Limit		Username:	
	PIN:	CVV:	Password:	
	Bank:		Due Date:	
	Card No:		Expiration Date:	
	Security Code:		Phone No:	
	Card Network:		Address:	
	Credit Limit		Username:	
	PIN:	CVV:	Password:	
			-	
	Bank:		Due Date:	
	Card No:		Expiration Date:	
	Security Code:		Phone No:	
	Card Network:		Address:	
	Credit Limit		Username:	
	PIN:	CVV:	Password:	