FINANCIAL PLANNER

TheWealthBlog

MONTHLY BUDGET

MONTH OF

INCOME			
DATE	SOURCE	CATEGORY	AMOUNT

BILLS & FIXED EXPENSES		
DATE	SOURCE	AMOUNT

VARIABLE EXPENSES		
DATE	SOURCE	AMOUNT

SUMMARY	
SOURCE	AMOUNT
INCOME	
BILLS & FIXED EXPENSES	
VARIABLE EXPENSES	
BALANCE	

Annual Summary

JANUARY	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

FEBRUARY	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

MARCH	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

APRIL	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

MAY	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

JUNE	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

JULY	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

AUGUST	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

SEPTEMBER	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

OCTOBER	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

NOVEMBER	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

DECEMBER	
Income	
Expenses	
Debt Payments	
Savings	
Investments	

Save $400 in 6 weeks challenge

☐ $100
Week 6

$80 ☐
Week 5

☐ $70
Week 4

$50 ☐
Week 3

☐ $30
Week 2

$20 ☐
Week 1

Debt Snowball Tracker

MONTH OF:

CREDITOR:

ACCOUNT:

AMOUNT:

DUE DATE:

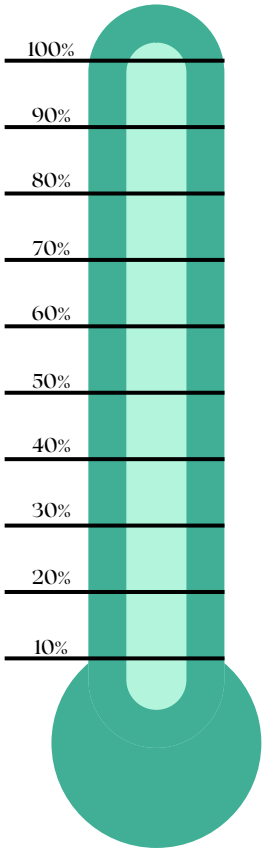
INTEREST RATE:

GOAL PAYOFF DATE:

MINIMUM PAYMENT:

DATE	ACCOUNT	BALANCE	NOTES

Visual Payoff Progress



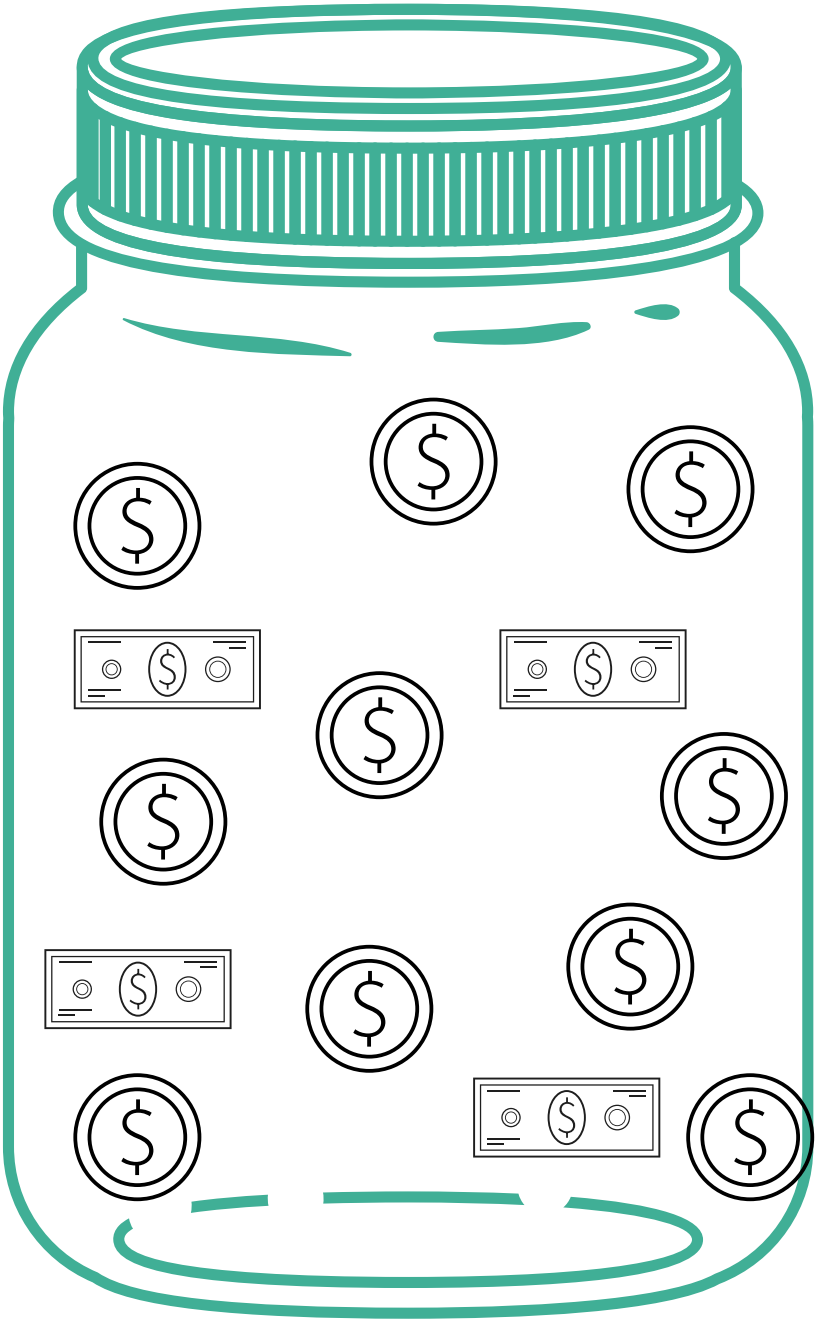
The Saving Jar

SAVINGS GOAL

STARTING BALANCE

= $10

= $50



PLANNER

MONTH:

M	T	W	T	F	S	S

Top priorities

Notes

ANNUAL BILLS

DUE DATE	BILL	AMOUNT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

TOTAL ______________

ANNUAL BILLS

DUE DATE	BILL	AMOUNT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

TOTAL ______________________

ANNUAL BILLS

DUE DATE	BILL	AMOUNT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

TOTAL

ANNUAL BILLS

DUE DATE	BILL	AMOUNT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

TOTAL ____________________

FINANCIAL GOALS

GOALS

PLAN

STEPS TO COMPLETE

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