

PERSONAL
FINANCE
P L A N N E R

1 INCH SPINE

1 & 1/2 INCH SPINE

2 INCH SPINE

3 INCH SPINE

Zero-Based Budget

[illegible][illegible]

Bi-Weekly Budget

INCOME

DATE	DESCRIPTION	AMOUNT
TOTAL		

EXPENSES

DATE	DESCRIPTION	AMOUNT
TOTAL		

SUMMARY

TOTAL INCOME	TOTAL EXPENSES	ENDING BALANCE

NOTES

Monthly Budget

Budget Goal: _____

Month: _____

I N C O M E

DATE	DESCRIPTION	AMOUNT
Total		

F I X E D E X P E N S E S

DATE	DESCRIPTION	AMOUNT
Total		

O T H E R E X P E N S E S

DATE	DESCRIPTION	AMOUNT
Total		

B I L L S

DATE	DESCRIPTION	AMOUNT
Total		

R E C A P

	GOAL	ACTUAL	DIFFERENCE
Earned			
Spent			
Debt			
Saved			

Annual Budget

JANUARY		
	Target	Actual
Income		
Expenses		
+/-		

MARCH		
	Target	Actual
Income		
Expenses		
+/-		

MAY		
	Target	Actual
Income		
Expenses		
+/-		

JULY		
	Target	Actual
Income		
Expenses		
+/-		

SEPTEMBER		
	Target	Actual
Income		
Expenses		
+/-		

NOVEMBER		
	Target	Actual
Income		
Expenses		
+/-		

FEBRUARY		
	Target	Actual
Income		
Expenses		
+/-		

APRIL		
	Target	Actual
Income		
Expenses		
+/-		

JUNE		
	Target	Actual
Income		
Expenses		
+/-		

AUGUST		
	Target	Actual
Income		
Expenses		
+/-		

OCTOBER		
	Target	Actual
Income		
Expenses		
+/-		

DECEMBER		
	Target	Actual
Income		
Expenses		
+/-		

Annual Finances

MONTH	INCOME	EXPENSES	SAVINGS	DEBT	BALANCE
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					
TOTAL					

Bill Payment Tracker

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

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

NOTES

Subscription Tracker

[illegible]

Medical Budget Tracker

Month of: _____ Year: _____

[illegible]

Income Tracker

Month of: _____ Year: _____

[illegible]

Expenses Tracker

Month of: _____ Year: _____

[illegible]

Side Hustle Income

Month of: _____ Year: _____

#	DESCRIPTION	SOURCE	AMOUNT
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			

Tax Deduction

[illegible]

401K Savings Tracker

Account: _____ Annual Limit: _____ Goal: _____

[illegible]

Cash Savings Tracker

DATE	DESCRIPTION	DEPOSIT	WITHDRAWAL	BALANCE
			Total	

Emergency Savings Tracker

Saving for: _____ Savings Goal: _____

[illegible]

Vacation Savings Tracker

Destination: _____ Target Date: _____

[illegible]

Start Date: _____ End Date: _____

[illegible]

Short-term Savings Tracker

Short-Term Goal: _____ Start Date: _____

[illegible]

Long-term Savings Tracker

Long-Term Goal: _____ Start Date: _____

[illegible]

Needs vs Wants

[illegible]

50/30/20 Budget Plan

NEEDS (50%)		
BILL	BUDGET	ACTUAL
TOTAL		

SAVINGS (30%)		
ACCOUNT	BUDGET	ACTUAL
TOTAL		

SUMMARY		
	BUDGET	ACTUAL
TOTAL INCOME		
TOTAL NEEDS		
TOTAL WANTS		
TOTAL SAVINGS		

INCOME		
BILL	BUDGET	ACTUAL
TOTAL		

WANTS (20%)		
EXPENSE	BUDGET	ACTUAL
TOTAL		

Grocery Price Tracker

[illegible]

Quarterly Financial Goals

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

QUARTER 1

QUARTER 2

[illegible][illegible]

Quarterly Financial Goals

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

QUARTER 3

QUARTER 4

[illegible][illegible]

Financial Goals

[illegible]

Donation Tracker

[illegible]

Net Worth Tracker

A S S E T S

Description	Value
Total:	

N O T E S

L I A B I L I T I E S

Description	Value
Total:	

N E T W O R T H

Total Assets

Total Liabilities

Total Net Worth

Debt Snowball Tracker

Debt: _____

Balance: _____

Min. Payment: _____

Debt: _____

Balance: _____

Min. Payment: _____

[illegible]

Debt: _____

Balance: _____

Min. Payment: _____

[illegible][illegible]

Debt: _____

Balance: _____

Min. Payment: _____

[illegible]

Retirement Funds Tracker

Investment Tracker

[illegible]

Log-in Information

[illegible]

Sinking Funds Tracker

[illegible]

Savings Challenge

Saving for: _____

Goal: _____

Start Date: _____

End Date: _____

[illegible][illegible]

Daily Expenses Tracker

[illegible]

Spending Tracker

[illegible]

Monthly Bill Tracker

Month: _____

[illegible]

Checkbook Register

[illegible]

Fuel Cost Tracker

[illegible]

Online Purchase Tracker

[illegible]