

Financial Planner

This Book Belongs To

BILL & SUBSCRIPTION TRACKER

| BILL | DUE | AMOUNT | J | F | M | A | M | J | J | A | S | O | N | D |
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ANNUALY

| DESCRIPTION | DUE | AMOUNT | ANNUAL RATE |
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SAVING PLANNER

YEAR: _____

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MONTHLY GOALS

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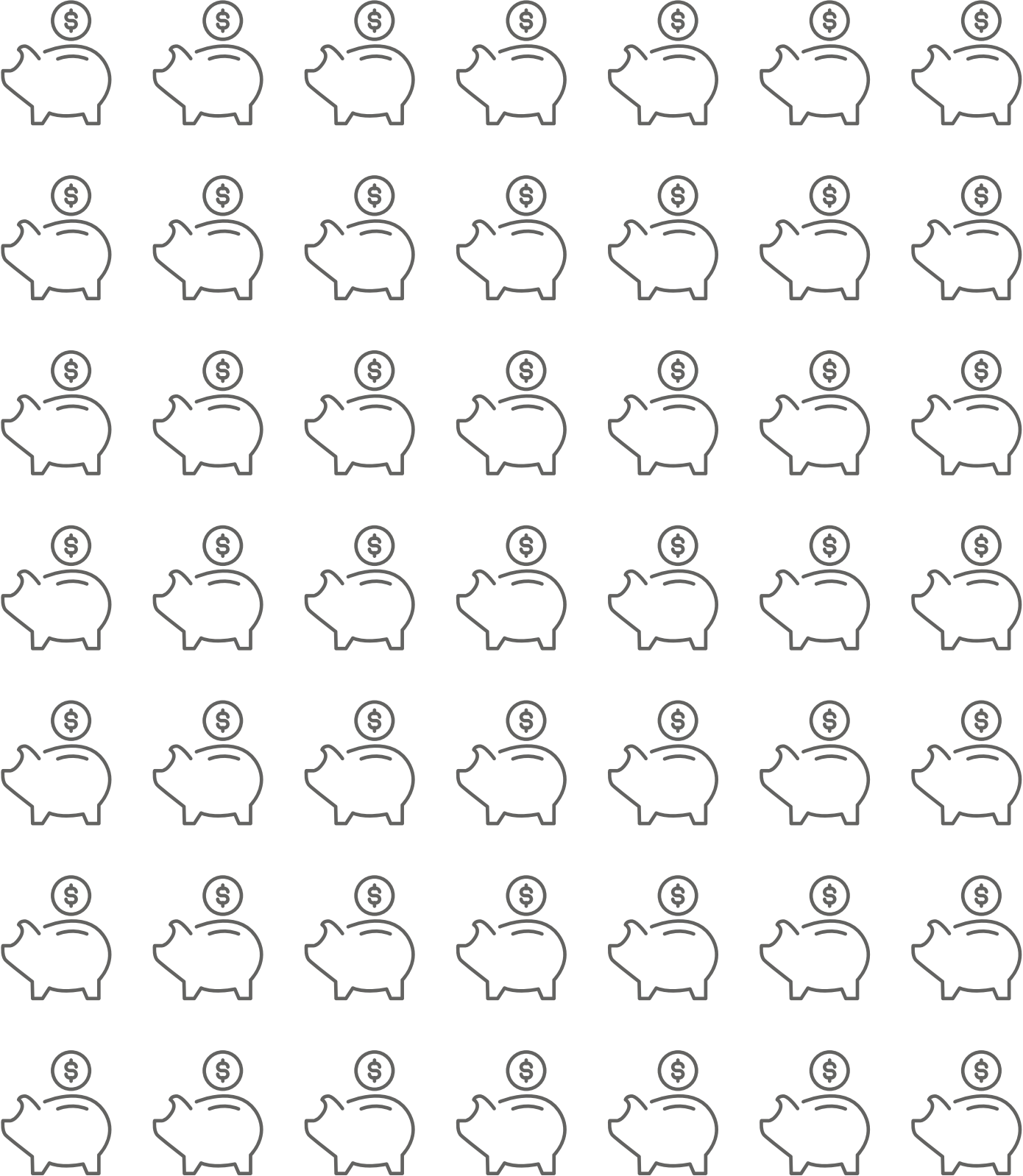
YEARLY GOALS

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SAVING TRACKER

SAVING FOR: _____ SAVING GOALS: _____

TARGET DATE: _____ STARTING BALANCE: _____



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:

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

ACCOUNTS DETAILS:

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

YEARLY EXPENSES

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DEBT PAYMENT TRACKER

CREDITOR:

INTEREST RATE :

ACCOUNT NO :

STARTING BALANCE :

DUE DATE :

| MONTH | MONTH | MONTH |
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| JANUARY | | |
| FEBRUARY | | |
| MARCH | | |
| APRIL | | |
| MAY | | |
| JUNE | | |
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| AUGUST | | |
| SEPTEMBER | | |
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| DECEMBER | | |

CREDITOR:

INTEREST RATE :

ACCOUNT NO :

STARTING BALANCE :

DUE DATE :

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

MONTHLY BUDGET

MONTHLY GOAL:

MONTH/YEAR:

INCOME

| DATE | DESCRIPTION | AMOUNT | AFTER TAX |
|------|-------------|--------|-----------|
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FIXED EXPENSES

| DATE | DESCRIPTION | AMOUNT |
|-------|-------------|--------|
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| TOTAL | | |

OTHER EXPENSES

| DATE | DESCRIPTION | AMOUNT |
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| TOTAL | | |

RECAP

| | GOAL | ACTUAL | DIFFERENCE |
|-------|------|--------|------------|
| EARN | | | |
| SPENT | | | |
| DEBT | | | |
| SAVED | | | |

YEARLY OVERVIEW

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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 | | |
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| 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

NO SPEND CHALLENGE

MAIN GOAL:

MONTH:

START DATE:

END DATE:

RULES:

DO NOT BUY LIST

EXCEPTIONALS FROM THE RULES

FUTURE GOALS

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

FINANCIAL CALENDAR

| SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
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NOTES: _____

FINANCIAL SUMMARY

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

NET WORTH TRACKER

MONTH:

TOTAL ASSETS:

NET WORTH:

YEAR:

TOTAL LIABILITIES:

ASSETS

DESCRIPTION

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UPCOMING EXPENSES

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