



BUDGET & FINANCIAL PLANNER

FINANCE BINDER

TRACK • SAVE • BUDGET

This planner belongs to:

SECTION 1

FINANCIAL OVERVIEW

Income • Expenses • Net Worth



Financial Goals Worksheet



GOAL: _____ \$										
START DATE: _____						COMPLETION DATE: _____				
PROGRESS:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
NOTES										
GOAL: _____ \$										
START DATE: _____						COMPLETION DATE: _____				
PROGRESS:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
NOTES										
GOAL: _____ \$										
START DATE: _____						COMPLETION DATE: _____				
PROGRESS:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
NOTES										
GOAL: _____ \$										
START DATE: _____						COMPLETION DATE: _____				
PROGRESS:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
NOTES										
GOAL: _____ \$										
START DATE: _____						COMPLETION DATE: _____				
PROGRESS:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
NOTES										

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Daily Expense Tracker



DATE:

DAILY BUDGET:

EXPENSE LOG				
TIME	CATEGORY	DESCRIPTION	PAYMENT METHOD	AMOUNT
TOTAL SPENT:				
REMAINING BALANCE:				
NOTES				

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Credit Card List



CARD NAME:	CARD TYPE:
CARD HOLDER NAME:	
CREDIT LIMIT:	CARD #: ☒
EXPIRATION DATE:	CVV:
WEBSITE:	
USER NAME:	PASSWORD:
SECURITY QUESTION:	ANSWER:
NOTES	

CARD NAME:	CARD TYPE:
CARD HOLDER NAME:	
CREDIT LIMIT:	CARD #:
EXPIRATION DATE:	CVV:
WEBSITE:	
USER NAME:	PASSWORD:
SECURITY QUESTION:	ANSWER:
NOTES	

CARD NAME:	CARD TYPE:
CARD HOLDER NAME:	
CREDIT LIMIT:	CARD #:
EXPIRATION DATE:	CVV:
WEBSITE:	
USER NAME:	PASSWORD:
SECURITY QUESTION:	ANSWER:
NOTES	

Loan Overview Worksheet



MONTH / YEAR:

LOAN TYPE	LENDER	INTEREST RATE	ORIGINAL BALANCE	CURRENT BALANCE	MONTHLY PAYMENT	DUE DATE
TOTAL LOAN BALANCE:						
TOTAL MONTHLY PAYMENTS:						
NOTES:						

Debt Overview



MONTH / YEAR:

DEBT SUMMARY					
CREDITOR	DEBT TYPE	INTEREST RATE	BALANCE	MINIMUM PAYMENT	DUE DATE
TOTAL DEBT BALANCE:					
TOTAL MINIMUM PAYMENTS:					
NOTES:					

Savings Goal Planner



GOAL NAME:		TARGET AMOUNT:	
CURRENT AMOUNT:		AMOUNT STILL NEEDED:	
START DATE:		TARGET COMPLETION DATE:	
MONTHLY CONTRIBUTION GOAL:			
MONTH	PLANNED CONTRIBUTION	ACTUAL CONTRIBUTION	REMAINING BALANCE
NOTES:			

Income Tracker



MONTH / YEAR:				
EXPECTED INCOME:		ACTUAL INCOME:		
INCOME LOG				
DATE	INCOME SOURCE	CATEGORY	AMOUNT	PAYMENT METHOD
NOTES:				

Investment Accounts List



ACCOUNT NAME:	ACCOUNT TYPE:
INSTITUTION / BROKER:	
ACCOUNT NUMBER (LAST 4):	ACCOUNT OWNER:
WEBSITE:	
USER NAME:	PASSWORD:
SECURITY QUESTION:	ANSWER:
NOTES:	
ACCOUNT NAME:	ACCOUNT TYPE:
INSTITUTION / BROKER:	
ACCOUNT NUMBER (LAST 4):	ACCOUNT OWNER:
WEBSITE:	
USER NAME:	PASSWORD:
SECURITY QUESTION:	ANSWER:
NOTES:	
ACCOUNT NAME:	ACCOUNT TYPE:
INSTITUTION / BROKER:	
ACCOUNT NUMBER (LAST 4):	ACCOUNT OWNER:
WEBSITE:	
USER NAME:	PASSWORD:
SECURITY QUESTION:	ANSWER:
NOTES:	
ACCOUNT NAME:	ACCOUNT TYPE:
INSTITUTION / BROKER:	
ACCOUNT NUMBER (LAST 4):	ACCOUNT OWNER:
WEBSITE:	
USER NAME:	PASSWORD:
SECURITY QUESTION:	ANSWER:
NOTES:	
ACCOUNT NAME:	ACCOUNT TYPE:
INSTITUTION / BROKER:	
ACCOUNT NUMBER (LAST 4):	ACCOUNT OWNER:
WEBSITE:	
USER NAME:	PASSWORD:
SECURITY QUESTION:	ANSWER:
NOTES:	

[illegible]

Insurance Policy Log



POLICY NAME:	POLICY NUMBER:
CARRIER / AGENT:	
PHONE:	EMAIL:
WEBSITE:	
USERNAME:	PASSWORD:
PREMIUM / PAYMENT SCHEDULE:	
NOTES:	
POLICY NAME:	POLICY NUMBER:
CARRIER / AGENT:	
PHONE:	EMAIL:
WEBSITE:	
USERNAME:	PASSWORD:
PREMIUM / PAYMENT SCHEDULE:	
NOTES:	
POLICY NAME:	POLICY NUMBER:
CARRIER / AGENT:	
PHONE:	EMAIL:
WEBSITE:	
USERNAME:	PASSWORD:
PREMIUM / PAYMENT SCHEDULE:	
NOTES:	
POLICY NAME:	POLICY NUMBER:
CARRIER / AGENT:	
PHONE:	EMAIL:
WEBSITE:	
USERNAME:	PASSWORD:
PREMIUM / PAYMENT SCHEDULE:	
NOTES:	
POLICY NAME:	POLICY NUMBER:
CARRIER / AGENT:	
PHONE:	EMAIL:
WEBSITE:	
USERNAME:	PASSWORD:
PREMIUM / PAYMENT SCHEDULE:	
NOTES:	

Tax Document Checklist



✓	PERSONAL INFORMATION DOCUMENTS
☐	SOCIAL SECURITY NUMBERS
☐	PREVIOUS YEAR'S TAX RETURN
☐	BANK ACCOUNT INFORMATION
☐	
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✓	INCOME DOCUMENTS
☐	W-2 FORMS
☐	1099-NEC / 1099-MISC
☐	1099-INT (INTEREST INCOME)
☐	1099-DIV (DIVIDENDS)
☐	INVESTMENT STATEMENTS
☐	RENTAL INCOME RECORD
☐	
☐	
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☐	

✓	DEDUCTION DOCUMENTS
☐	MORTGAGE INTEREST STATEMENT
☐	PROPERTY TAX RECORDS
☐	CHARITABLE DONATION RECEIPTS
☐	MEDICAL EXPENSE RECORDS
☐	BUSINESS EXPENSE RECORDS
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NOTES

Bank Account List



ACCOUNT TYPE:	
ACCOUNT #:	ROUTING #:
BANK NAME:	PHONE #
ADDRESS:	
WEBSITE:	
USER NAME:	PASSWORD:
DEBIT CARD #:	PIN #:
DEBIT CARD #:	PIN #:
NOTES:	

ACCOUNT TYPE:	
ACCOUNT #:	ROUTING #:
BANK NAME:	PHONE #
ADDRESS:	
WEBSITE:	
USER NAME:	PASSWORD:
DEBIT CARD #:	PIN #:
DEBIT CARD #:	PIN #:
NOTES:	

ACCOUNT TYPE:	
ACCOUNT #:	ROUTING #:
BANK NAME:	PHONE #
ADDRESS:	
WEBSITE:	
USER NAME:	PASSWORD:
DEBIT CARD #:	PIN #:
DEBIT CARD #:	PIN #:
NOTES:	

Notes





Thank You

FOR PREVIEWING!



You've just viewed a sample of this planner.
The complete version includes even more pages to help you
stay organized, plan with confidence, and reach your goals.

THE COMPLETE PLANNER INCLUDES:



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sections
included



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to keep you
on track



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