

MONTHLY & YEARLY BUDGET PLANNER

“The secret to budgeting is that it needs to be honest. Not what you think it should be or wish it could be, but what it really is.”

— Lisa Conway-Hughes

PLAN YOUR BUDGET

TOTAL EXPENSE:

TOTAL INCOME:

TOTAL SAVING:

INCOME		
	DATE	AMOUNT
Income #1		
Income #2		
Side Hustle		

FIXED EXPENSES	
DATE	AMOUNT

OTHER EXPENSES	
DATE	AMOUNT



ANNUAL BILLS

ANNUAL BILL	AMOUNT	DUE	✓
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MONTHLY

BILLS

Bill	Amount	Due	Paid
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1ST QTR

DEBT SNOWBALL

				NEW BALANCE EACH MONTH		
DEBT NAME	AMT OWED	MIN PMT	DEBT SNOWBALL PMT	JAN	FEB	MAR



2ND QTR

DEBT SNOWBALL

				NEW BALANCE EACH MONTH		
DEBT NAME	AMT OWED	MIN PMT	DEBT SNOWBALL PMT	APR	MAY	JUNE



3RD QTR

DEBT SNOWBALL

				NEW BALANCE EACH MONTH		
DEBT NAME	AMT OWED	MIN PMT	DEBT SNOWBALL PMT	JULY	AUG	SEPT



4TH QTR

DEBT SNOWBALL

				NEW BALANCE EACH MONTH		
DEBT NAME	AMT OWED	MIN PMT	DEBT SNOWBALL PMT	OCT	NOV	DEC



EXPENSE

TRACKER

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Output Type	Budget	Spent
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Transaction Account

Total Income	Total Expense	Overall Balance

Saving Account

Total Income	Total Expense	Overall Balance



EXPENSE TRACKER

MONTH:

EXPENSE:

DATE	ITEM	SPENT	REMAINS



MONTHLY

FINANCIAL GOALS

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER



SPECIFIC ANNUAL

SAVINGS GOAL

Saving Goal:

Deadline:

Motivation:

Starting Balance:

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER



MONTHLY SAVING

GOALS

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Saving Goal:

Deadline:

Motivation

Starting Balance



MONTHLY EXPENSE COMPARISON

JANUARY 2023

DESCRIPTION	AMOUNT
TOTAL	

FEBRUARY 2023

DESCRIPTION	AMOUNT
TOTAL	

MARCH 2023

DESCRIPTION	AMOUNT
TOTAL	

APRIL 2023

DESCRIPTION	AMOUNT
TOTAL	



MONTHLY EXPENSE COMPARISON

MAY 2023

DESCRIPTION	AMOUNT
TOTAL	

JUNE 2023

DESCRIPTION	AMOUNT
TOTAL	

JULY 2023

DESCRIPTION	AMOUNT
TOTAL	

AUGUST 2023

DESCRIPTION	AMOUNT
TOTAL	



MONTHLY EXPENSE COMPARISON

SEPTEMBER 2023

DESCRIPTION	AMOUNT
TOTAL	

OCTOBER 2023

DESCRIPTION	AMOUNT
TOTAL	

NOVEMBER 2023

DESCRIPTION	AMOUNT
TOTAL	

DECEMBER 2023

DESCRIPTION	AMOUNT
TOTAL	



2023 BILLS

JANUARY

DUE DATE	BILL	AMOUNT	PAID
INCOME	EXPENSES	BALANCE	



2023 BILLS

FEBRUARY

DUE DATE	BILL	AMOUNT	PAID
INCOME	EXPENSES	BALANCE	



2023 BILLS

MARCH

DUE DATE	BILL	AMOUNT	PAID
INCOME	EXPENSES	BALANCE	



2023 BILLS

JUNE

DUE DATE	BILL	AMOUNT	PAID
INCOME	EXPENSES	BALANCE	



2023 BILLS

AUGUST

DUE DATE	BILL	AMOUNT	PAID
INCOME	EXPENSES	BALANCE	



2023 BILLS

SEPTEMBER

DUE DATE	BILL	AMOUNT	PAID
INCOME	EXPENSES	BALANCE	



2023 BILLS

OCTOBER

DUE DATE	BILL	AMOUNT	PAID
INCOME	EXPENSES	BALANCE	



2023 BILLS

DECEMBER

DUE DATE	BILL	AMOUNT	PAID
INCOME	EXPENSES	BALANCE	

