

Annual Personal Financial Planner

Personal Information

Full Name

Year

Annual Income

Income Source	Amount (Yearly)
Salary	
Bonuses	
Investment Income	
Other	
Total Income	

Annual Expenses

Category	Budgeted	Actual
Housing		
Utilities		
Food & Groceries		
Transportation		
Insurance		
Healthcare		
Debt Payments		
Education		
Entertainment		
Travel		
Other		
Total Expenses		

Annual Savings & Investments

Type	Target Amount	Actual Amount
Emergency Fund		
Retirement		
Investments		
Other		
Total Savings & Investments		

Debt Overview

Debt Type	Balance	Interest Rate	Annual Payment
Mortgage			
Credit Cards			
Student Loans			
Other			
Total Debt			

Financial Goals

Goal 1

Describe your goal

Goal 2

Describe your goal

Goal 3

Describe your goal

Notes & Reflections

Write any additional notes or reflections here