

Annual Personal Financial Planner

Personal Information

Full Name

Enter full name

Year

2024

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