

Shared Couples™ Financial Planner

1. Monthly Income

Source	Partner 1	Partner 2	Total
e.g. Salary			
e.g. Side Income			

2. Monthly Expenses

Category	Amount
e.g. Rent/Mortgage	
e.g. Groceries	
e.g. Utilities	
e.g. Transport	
e.g. Childcare/Other	

3. Savings & Investments

Type	Amount
e.g. Emergency Fund	
e.g. Retirement	
e.g. Investments	

4. Shared Goals

Goal	Target Amount	Timeline
e.g. Vacation		e.g. 6 months
e.g. Home Down Payment		e.g. 2 years

5. Notes

Add any notes or agreements here...