

Home Financial Planning Template

1. Household Profile

Household Name:

Number of Members:

Date:

2. Income Sources

Source	Amount (per month)
<input type="text" value="e.g. Salary"/>	<input type="text"/>
<input type="text" value="e.g. Freelance"/>	<input type="text"/>
<input type="text" value="Other"/>	<input type="text"/>

3. Expense Categories

Category	Planned (per month)	Actual (per month)
<input type="text" value="e.g. Rent/Mortgage"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="e.g. Utilities"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="e.g. Groceries"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Other"/>	<input type="text"/>	<input type="text"/>

4. Savings & Investments

Type	Monthly Contribution	Goal
<input type="text" value="e.g. Emergency Fund"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="e.g. Retirement"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Other"/>	<input type="text"/>	<input type="text"/>

5. Notes & Reflections

Write down insights, concerns, or financial goals...