

Blank Annual Financial Planning Worksheet

Name

Year

Date

Estimated Annual Income

Description	Estimated Amount (\$)
Salary/Wages	
Business/Side Income	
Investment Income	
Other (Specify)	
Total Estimated Income	

Estimated Annual Expenses

Description	Estimated Amount (\$)
Housing (Rent/Mortgage)	
Utilities	
Food & Groceries	
Transportation	
Health/Insurance	
Education	
Entertainment/Recreation	
Savings & Investments	
Other (Specify)	
Total Estimated Expenses	

Annual Financial Summary

Description	Amount (\$)
Total Estimated Income	
Total Estimated Expenses	
Estimated Annual Net Savings	

Financial Planning Goals & Notes

Enter your financial goals, plans, or notes here.