

Personal Financial Planning Sheet

Personal Information

Name	<input type="text" value="Full Name"/>
Date	<input type="text"/>
Period Covered	<input type="text" value="e.g., Jan - Mar 2024"/>

Income

Source	Amount
<input type="text" value="Salary"/>	<input type="text"/>
<input type="text" value="Other Income"/>	<input type="text"/>
<input type="text" value="Other"/>	<input type="text"/>
Total Income	<input type="text"/>

Expenses

Category	Estimated	Actual
<input type="text" value="Housing/Rent"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Utilities"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Groceries"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Transportation"/>	<input type="text"/>	<input type="text"/>

Insurance		
Other		
Total Expenses		

Savings & Investments

Type	Amount
Bank Savings	
Retirement	
Investments	
Total Savings	

Debt & Liabilities

Type	Amount Owed	Monthly Payment
Credit Card		
Loan		
Other		
Total Debt		

Notes & Goals

Add your notes or financial goals here