

Personal Financial Planning Sheet

Personal Information

Name	Full Name
Date	
Period Covered	e.g., Jan - Mar 2024

Income

Source	Amount
Salary	
Other Income	
Other	
Total Income	

Expenses

Category	Estimated	Actual
Housing/Rent		
Utilities		
Groceries		
Transportation		

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