

# ANNUAL BUDGET PLANNER



YEAR:

♥ Plan your money. Reach your goals. Build your future. ♥



## FINANCIAL GOALS

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



## EXPECTED ANNUAL INCOME

|                     |                 |
|---------------------|-----------------|
| Salary / Wages      | \$ _____        |
| Side Income         | \$ _____        |
| Investments         | \$ _____        |
| Other Income        | \$ _____        |
| <b>TOTAL INCOME</b> | <b>\$ _____</b> |



## MONTHLY INCOME SUMMARY

| MONTH        | INCOME (\$)     |
|--------------|-----------------|
| JAN          |                 |
| FEB          |                 |
| MAR          |                 |
| APR          |                 |
| MAY          |                 |
| JUN          |                 |
| JUL          |                 |
| AUG          |                 |
| SEP          |                 |
| OCT          |                 |
| NOV          |                 |
| DEC          |                 |
| <b>TOTAL</b> | <b>\$ _____</b> |

## ANNUAL EXPENSES SUMMARY



### HOUSING

BUDGET (\$)

\$ \_\_\_\_\_



### UTILITIES

BUDGET (\$)

\$ \_\_\_\_\_



### FOOD

BUDGET (\$)

\$ \_\_\_\_\_



### TRANSPORTATION

BUDGET (\$)

\$ \_\_\_\_\_



### INSURANCE

BUDGET (\$)

\$ \_\_\_\_\_



### HEALTHCARE

BUDGET (\$)

\$ \_\_\_\_\_



### SAVINGS

BUDGET (\$)

\$ \_\_\_\_\_



### INVESTMENTS

BUDGET (\$)

\$ \_\_\_\_\_



### DEBT PAYMENTS

BUDGET (\$)

\$ \_\_\_\_\_



### ENTERTAINMENT

BUDGET (\$)

\$ \_\_\_\_\_



### MISCELLANEOUS

BUDGET (\$)

\$ \_\_\_\_\_

TOTAL INCOME

\$ \_\_\_\_\_

TOTAL EXPENSES

\$ \_\_\_\_\_

ANNUAL SAVINGS GOAL

\$ \_\_\_\_\_

REMAINING BALANCE

(INCOME - EXPENSES)

\$ \_\_\_\_\_



### ANNUAL SAVINGS GOAL

Goal Amount \$ \_\_\_\_\_

Target Date \_\_\_\_\_

Why This Goal is Important:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



### NOTES

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

