## Funarial goals WORKSHEET

List 3 Financial Goals $\not \subset 3$ Milestones $\not \subset \mathscr{C}$ Due Dates for each Larger Goal.

## GOAL 1:

| MILESTONE 1: | DUE DATE: |
| :--- | :--- |
| MLLESTONE 2: | DUE DATE: |
| MLLESTONE 3: | DUE DATE: |

## GOAL 2:

| MILESTONE 1: | DUE DATE: |
| :--- | :--- |
| MILESTONE 2: | DUE DATE: |
| MLLESTONE 3: | DUE DATE: |

## GOAL 3:

| MILESTONE 1: | DUE DATE: |
| :--- | :--- |
| MLLESTONE 2: | DUE DATE: |
| MILESTONE 3: | DUE DATE: |

## assets Imentory WORKSHEET

List items you own that have value, Number each asset with 1-5 a 1 being an item you don't use very often, a 5 an item that is important to you, then write down the current market value of the item and indicate if the item is going up or down in value.

| ASSET | IMPORTANCE |  | UP/DOWN |
| :---: | :---: | :---: | :---: |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |
|  |  | \$ | $\uparrow \downarrow$ |

## Dept Summarry WORKSHEET

List the debts you owe in order from smallest at the top to the largest at the bottom. You will also want to list who you owe, the total outstanding balance and the minimum monthly payment for each item on the list. This will help you as you create your personal budget.
DEBT / PERSON OWED

# Weckly Experse WORKSHEET 

Outline all of the items you spend money on each week. This list is for the consistent items you buy, try going through your week and thinking over what your schedule is each day, that will help you remember some of the hidden expenses each week. Give each item a number of importance, a 1 being not as important and a 5 being something that is extremely important to you.


# Mouthly Experse WORKSHEET 

Outline all of the items you spend money on each month. This list is for the consistent items you pay for on a monthly or bi-weekly basis like rent, car payments, Insurance, water \& electric bills and other household expenses. Give each item a number of importance, a 1 being not as important and a 5 being something that is extremely important to you.


## Iufrequent Expense WORKSHEET

List your Infrequent expenses, things that happen less than monthly but at least once per year. Once you list the full amount divide by 52 if you get paid weekly, 26 if you get paid every other week, 24 if you get paid twice a month or 12 if you are paid monthly. The smaller amount is what you need to set back each paycheck to have the money when your payment is due.


## Categony Summariy WORKSHEET

Review your Weekly, Monthly and In-Frequent Spending Chart and combine items into more general categories. For example Eating Out, and Movies might be combined into "Entertainment", List the sum of the amounts you spend on these items in this category (Based on your paycheck frequency). Then give each category a priority, a 1 is important, a 5 is not important.

| CATEGORY | SUM OF ALL ITEMS \$ | PRIORITY |
| :---: | :---: | :---: |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |
|  | \$ |  |

## Income Plaurning WORKSHEET

List each source of income you have coming into your family budget at any point during the year. Next estimate the amount of income you expect to receive and the frequency of the payment (Weekly, Monthly, Twice a Year). The last thing you want to do is define the income as Fixed, Flexible or Supplementary.
INCOME SOURCE

## Bualget Category WORKSHEET

List your expected income and expenses for each budget category.

| CATEGORY | CURRENT VALUE | STARTING VALUE | EXPENSES | ADDMONEY |
| :--- | :---: | :---: | :---: | :---: |
| Mortgage/Rent |  |  |  |  |
| Car Insurance |  |  |  |  |
| Fuel |  |  |  |  |
| Utilities |  |  |  |  |
| Groceries |  |  |  |  |
| Entertainment |  |  |  |  |
| Cable/Internet |  |  |  |  |


| CATEGORY | CURRENT VALUE | STARTING VALUE | EXPENSES | ADD MONEY |
| :---: | :---: | :---: | :---: | :---: |
| CATEGORY | Curkent value | staring Value | EXPENSES | ADDMONEY |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

