



Net Income	Name	Monthly	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Primary Income										
Secondary Income										
Other Incomes										
Total Net Income		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Primary Expenses	Arrears/Due Dates/Notes	Monthly	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Rent/Mortgage										
Vehicle(s)										
Property Taxes										
Condo Fees/Park Rent/Lot Fees										
Water/Sewer/Garbage										
Oil Heat/Natural Gas										
Wood/Pellets/Propane										
Electric										
Cell Phone										
Telephone/Bundle										
Internet										
Cable/Satellite										
Groceries/Toiletries										
Gas/Bus/Taxi/Parking										
Child Care										
Child/Spousal Support										
Auto Insurance										
Renter's/Homeowner's Insurance										
Health Insurance										
Life Insurance										
Bank Fees										
Laundry										
Subtotal		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Periodic Expenses		Monthly	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Home Repair/Maintenance										
Auto Repair/Maintenance										
Prescriptions/Eye Care/Dental										
Clothing										
School Fees/Tuition										
Professional Fees/Union Dues										
Gifts										
Donations										
Haircuts/Salon										
Pet Care/Vet Costs										
Sports/Gym										
Subscriptions										
Subtotal		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Discretionary Expenses		Monthly	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Personal Cash (coffee, lunches)										
Take-out/Restaurants										
Entertainment/Hobbies/Clubs										
Cigarettes/Vape/Alcohol/Cannabis										
Subtotal		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Savings		Monthly	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Subtotal		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Debts		Monthly	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Subtotal		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Expenses		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Cash Flow +/-		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00



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Financial Goals

What are your financial goals?	What is the total cost of each goal?	How much is affordable to save each month?	How long will it take to achieve your goal?

HELPFUL ADVICE



- ✓ Write it down
- ✓ Be realistic
- ✓ Prioritize your goals
- ✓ Make a plan
- ✓ Set timelines
- ✓ Track progress
- ✓ Visualize your goal
- ✓ Involve your family
- ✓ Expect bumps in the road
- ✓ Do not give up
- ✓ Celebrate your progress

Long term financial wellness for all.