

FINANCE AUDIT TRACKER

Review Period: _____

Date Performed: ____ / ____ / 20__

Total Income
Total Expenses
Net Savings
Savings Rate %

Recurring Subscriptions & Fixed Costs

[illegible]

Debt & Liability Tracking

ACCOUNT	BALANCE	INTEREST RATE	MIN PAYMENT
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ACCOUNT

BALANCE

INTEREST RATE

MIN PAYMENT

Audit Checklist

Review bank statements for unauthorized charges

Update Emergency Fund balance

Verify credit score movement

Rebalance investment portfolio

Categorize "Misc" spending items

Check insurance premium rates