

MONTHLY BUDGET PLANNER

Financial Performance Tracking

PERIOD: _____

DATE: _____

TOTAL PROJECTED INCOME

\$

TOTAL ACTUAL EXPENSES

\$

NET SAVINGS / SURPLUS

\$

EXPENSE CATEGORY

BUDGETED

ACTUAL

DIFFERENCE

HOUSING & UTILITIES

Rent / Mortgage

Electricity / Water / Gas

TRANSPORTATION

Fuel / Public Transit

Insurance / Maintenance

LIFESTYLE & HEALTH

Groceries

EXPENSE CATEGORY

BUDGETED

ACTUAL

DIFFERENCE

Dining & Entertainment

Healthcare / Insurance

FINANCIAL GOALS

Debt Repayment

Emergency Fund / Savings