

MONTHLY ALLOCATION

Budget Planning & Tracking

Month:

Year:

01. INCOME SOURCES

Description	Date	Budgeted	Actual
Primary Salary		\$	\$
Secondary/Side Income		\$	\$
Other / Bonus		\$	\$

02. FIXED EXPENSES & HOUSING

Expense Category	Due Date	Planned	Paid
Rent / Mortgage		\$	[]
Utilities (Water/Elec/Gas)		\$	[]
Internet / Phone		\$	[]
Insurance (Auto/Health/Home)		\$	[]
Debt Repayment / Student Loans		\$	[]

03. VARIABLE ALLOCATION

Category	Target Limit	Actual Spend	Difference
Groceries & Household	\$	\$	\$
Transportation / Fuel	\$	\$	\$

Category	Target Limit	Actual Spend	Difference
Dining & Entertainment	\$	\$	\$
Personal Care / Shopping	\$	\$	\$

04. SAVINGS & INVESTMENTS

Contribution Goal		Planned	Actual	Done
Emergency Fund	\$	\$		[]
Retirement (401k/IRA)	\$	\$		[]
Long-term Investments	\$	\$		[]
Sinking Funds / Vacation	\$	\$		[]

TOTAL INCOME \$

TOTAL EXPENSES \$

TOTAL SAVINGS \$

NET REMAINING \$