

MONTHLY INCOME ALLOCATION

Fiscal Period: _____

Total Net Income: \$ _____

Total Income**\$0.00**
Fixed Costs**\$0.00**
Savings/Debt**\$0.00**
Remaining**\$0.00**

ALLOCATION CATEGORY	PLANNED (%)	PROJECTED (\$)	ACTUAL (\$)	VARIANCE
Essential Fixed Expenses (50%)				
Housing (Mortgage/Rent)				
Utilities (Power/Water/Web)				
Insurance (Health/Auto/Life)				
Transportation & Fuel				
Financial Goals & Obligations (20%)				
Emergency Fund Contribution				
Retirement (401k/IRA)				
Debt Repayment (Credit/Loans)				

ALLOCATION CATEGORY	PLANNED (%)	PROJECTED (\$)	ACTUAL (\$)	VARIANCE
Long-term Investments				
Lifestyle & Variable (30%)				
Groceries & Household				
Dining & Entertainment				
Personal Care & Shopping				
Subscriptions & Hobbies				
TOTALS	100%	\$	\$	\$

STRATEGIC NOTES
GOALS FOR NEXT MONTH