

MONTHLY ALLOCATION

Financial Planning Template

TOTAL NET INCOME
TOTAL EXPENSES
NET SAVINGS/SURPLUS

PERIOD

Fixed Allocations	Planned %	Budgeted Amount	Actual
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Housing / Mortgage

Utilities & Services

Insurance Premiums

Debt Repayment

Variable Allocations	Planned %	Budgeted Amount	Actual
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Groceries & Household

Transportation

Personal & Lifestyle

Emergency Fund / Investment

This document is a visual template for manual entry and record-keeping purposes.