

WEALTH BUILDING JOINT ACCOUNT

Monthly Budget & Allocation Tracker

MONTH/YEAR:

JOINT GOAL:

Income Source / Partner	Planned Contribution	Actual	Status
Partner A Contribution	\$	\$	
Partner B Contribution	\$	\$	
Other / Dividend Income	\$	\$	
Total Monthly Capital	\$	\$	

Asset Allocation (Wealth Building)	Target %	Amount	Done
High-Yield Savings / Emergency Fund		\$	
Index Funds / Stock Market		\$	
Real Estate / REITs		\$	

Asset Allocation (Wealth Building)	Target %	Amount	Done
Retirement Accounts (IRA/401k)		\$	
Total Reinvested	100%	\$	

JOINT NOTES & MILESTONE CELEBRATION:

"Wealth is the ability to fully experience life." - Joint Prosperity Template