

# PERSONAL FINANCE TRACKER

Financial Period: \_\_\_\_\_

Confidential Document

## INCOME SOURCES

SOURCE DESCRIPTION

PLANNED

ACTUAL

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## Total Income

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## FIXED EXPENSES

CATEGORY

AMOUNT

Housing / Rent

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Utilities & Internet

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Insurance Premiums

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Debt Repayment

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## WEALTH BUILDING

ACCOUNT

CONTRIBUTION

Emergency Fund

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Retirement (401k/IRA)

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Brokerage / Stocks

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Short-term Savings

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## VARIABLE EXPENSES

**CATEGORY**

**AMOUNT**

Groceries & Dining

Transport / Fuel

Personal / Leisure

Miscellaneous

**FINANCIAL HEALTH SUMMARY**

	Total Assets	
\$	_____	
	Total Liabilities	
\$	_____	
	Net Worth	
\$	_____	
	Savings Rate (%)	
	_____	%

**GOALS & ACTION ITEMS**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_