

BUDGET SURPLUS ALLOCATION

Period Ending: _____

TOTAL REVENUE

\$

TOTAL SURPLUS AVAILABLE

\$

ALLOCATION PRIORITY	%	TARGET AMOUNT	NOTES / ACCOUNT
Emergency Fund Top-up		\$	
High-Interest Debt Paydown		\$	
Retirement Contributions		\$	
Short-term Savings (Travel/Gear)		\$	
Brokerage / Investments		\$	
Charitable Giving		\$	

ALLOCATION PRIORITY	%	TARGET AMOUNT	NOTES / ACCOUNT
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Total Allocated	100%	\$	
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AUTHORIZED SIGNATURE