

PLANNER

2021





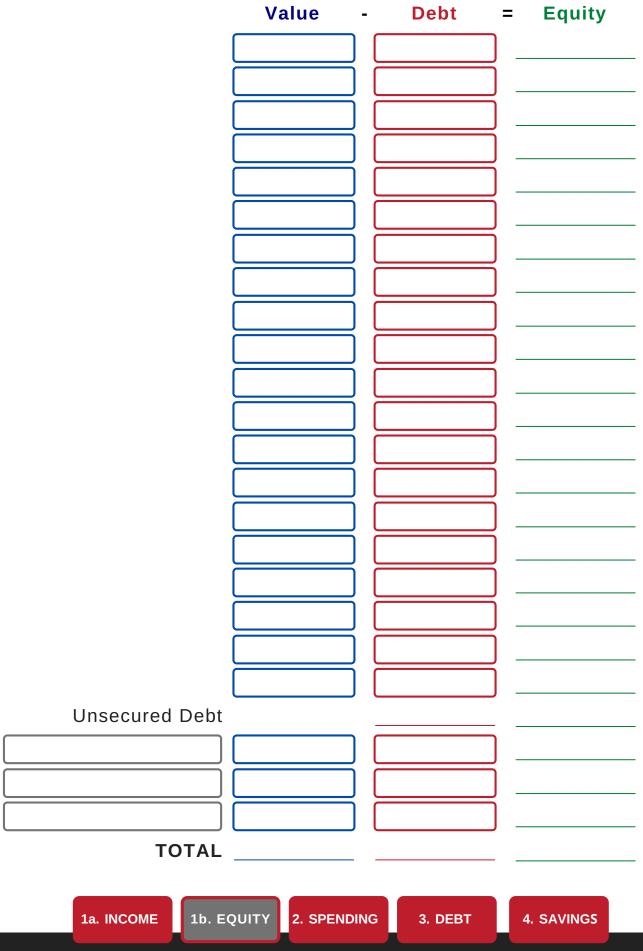
INCOME SUMMARY

Categories (Income Type)	Regular Income (Monthly Take Home)	Irregular Income (Annual Amounts)
TOTAL INCOME		2.0. 1
-TOTAL NECESSITIES		2. Spending
DISPOSABLE INCOME		
-DEBT PAYMENT		3. Debt
=EXTRA		
EMERGENCY FUND 1		3X Monthly Necessities
EMERGENCY FUND 2		6X Monthly Necessities
LIFE INSURANCE 1		8X Annual Income 10x
LIFE INSURANCE 2		Annual Income

1a. INCOME1b. EQUITY2. SPENDING3. DEBT4. SAVINGS



EQUITY





SPENDING

	Monthly Total	Planned Savings	Actual Total
GIVING			
EMERGENCY SAVINGS			
Other Savings			
HOUSING - Rent/Mortgage			
Second Mortgage			
Third Mortgage			
Repairs/Upkeep			
Property Tax			
Home Owners Insurance			
UTILITIES - Electricity Water			
Gas			
Phone			
Cell Phone			
Trash			
Cable			
Internet			
Groceries			
Eating Out			
Food Delivery			
MISC-			
Gifts			
TRANS - First Car Payment			
Second Car Payment			
Gas			
Repairs, Oil, Tires			
Car Insurance/Registration			
CLOTHING			
Personal Care/Hair			
Disability Insurance			
Health Insurance			
Life Insurance			
Child Care/Tuition			
Entertainment			
Subscription Services			
Vacation			
Med Co-Pay/RX/Den/Opt.			
Margin Money			
			<u> </u>
			<u> </u>
			<u> </u>
TOTAL			

1a. INCOME1b. EQUITY2. SPENDING3. DEBT4. SAVING



DEBT

List unsecured debt (ie. Credit Cards, Student Loans, service debts, etc.) only. Do not include debt already accounted for in your equity summary.

If you're working within a web browser, please input negative amounts only. (ie. \$-150)

Debt Name	Total Payoff	Minimum Payment	New Payment	Payments Remaining
TOTAL				
1a. INCOME 1b. EQUITY	2. SPENDING	3. DEBT	4. SA	AVING



SAVINGS

Total Amount To Save: _		Allo	Total cated:		Startino Balance	9 .	
Goal 1	Goal 2	Goal 3	Goal 4	Goal 5	Goal 6	Goal 7	Goal 8
Goal 9	Goal 10	Goal 11	Goal 12	Goal 13	Goal 14	Goal 15	Goal 16
Date		In	Out	E	Balance	Alloca	ated
Date		In	Out		Balance	Alloca	ated
Date		In	Out		Balance	Alloca	ated
	1a. INCOME	1b. EQU	2. SP	ENDING	3. DEBT	4. SAVIN	G



SAVINGS(CONTINUED)

Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date	In In	Out	Balance	Allocated

1b. EQUITY 2. SPENDING 1a. INCOME

3. DEBT

4. SAVING



SAVINGS(CONTINUED)

Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated

1a. INCOME 1b. EQUITY

2. SPENDING

3. DEBT

4. SAVING



SAVINGS(CONTINUED)

Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date	In	Out	Balance	Allocated
Date		Out	Balance	Allocated
Date	In I	Out	Balance Balance	Allocated

1a. INCOME 1b. EQUITY

2. SPENDING

3. DEBT

4. SAVING