

My Financial Planner



YNOT SOLUTIONS
— NYC —

financial goals

1 YEAR

GOALS	ACTION PLAN

5 YEAR

GOALS	ACTION PLAN

yearly overview

for: _____

GOAL #1

starting balance

goal amount

GOAL #2

start

goal

GOAL #3

start

goal

	INCOME	EXPENSES	SAVINGS	DEBT PAID	NET WORTH
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

upcoming expenses

for: _____

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

net worth tracker

month & year: _____

[illegible]

Quarterly Net Worth			
	Assets	Liabilities	Net Worth
Q1 Jan-Mar			\$
Q2 Apr-June			\$
Q3 July-Sept			\$
Q4 Oct-Dec			\$

bill payments tracker

[illegible]

debt payoff tracker

ACCOUNT:

START BALANCE:

DUE DATE:

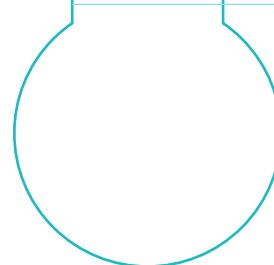
MIN DUE:

INTEREST RATE:

GOAL PAYOFF DATE:

[illegible]

	\$	100%
	\$	95%
	\$	90%
	\$	85%
	\$	80%
	\$	75%
	\$	70%
	\$	65%
	\$	60%
	\$	55%
	\$	50%
	\$	45%
	\$	40%
	\$	35%
	\$	30%
	\$	25%
	\$	20%
	\$	15%
	\$	10%
	\$	5%
	\$	0%

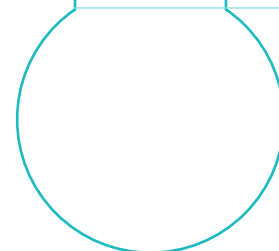


debt snowball tracker

ACCOUNT:		START BALANCE:
DUE DATE:		MIN DUE:
INTEREST RATE:		GOAL PAYOFF DATE:
DATE	PAYMENT	BALANCE
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$

ACCOUNT:		START BALANCE:
DUE DATE:		MIN DUE:
INTEREST RATE:		GOAL PAYOFF DATE:
DATE	PAYMENT	BALANCE
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$

	\$	100%
	\$	95%
	\$	90%
	\$	85%
	\$	80%
	\$	75%
	\$	70%
	\$	65%
	\$	60%
	\$	55%
	\$	50%
	\$	45%
	\$	40%
	\$	35%
	\$	30%
	\$	25%
	\$	20%
	\$	15%
	\$	10%
	\$	5%
	\$	0%



debt snowball tracker

		DEBT 1	DEBT 2	DEBT 3	DEBT 4
STARTING BALANCE:					
MIN PAYMENT:					
JANUARY	payment				
	new balance				
FEBRUARY	payment				
	new balance				
MARCH	payment				
	new balance				
APRIL	payment				
	new balance				
MAY	payment				
	new balance				
JUNE	payment				
	new balance				
JULY	payment				
	new balance				
AUGUST	payment				
	new balance				
SEPTEMBER	payment				
	new balance				
OCTOBER	payment				
	new balance				
NOVEMBER	payment				
	new balance				
DECEMBER	payment				
	new balance				

my account tracker

BANK:

ACCOUNT #:

STARTING BALANCE:

[illegible]

side hustle income tracker

month or year: _____

SOURCE:

[illegible]

SOURCE:

[illegible]

subscriptions tracker

year: _____

[illegible]

ANNUAL	RENEWAL DATE	AMOUNT
		\$
		\$
		\$
		\$
		\$
		\$
total per year		\$

QUARTERLY	RENEWAL DATE	AMOUNT
		\$
		\$
		\$
		\$
total per year		\$

monthly finance calendar

month: _____

[illegible]

monthly finance calendar

month: _____

[illegible]

NOTES:

spending categories & tags

DINING OUT

☐ take away & delivery

☐ restaurant

☐ bar

☐ work lunches

☐ _____

☐ _____

ENTERTAINMENT

☐ subscriptions

☐ movies

☐ hobbies

☐ event tickets

☐ _____

☐ _____

GROCERIES

☐ ready meals

☐ alcohol

☐ snacks

☐ meat

☐ _____

☐ _____

HEALTH & BEAUTY

☐ makeup

☐ clothes

☐ salon

☐ medicine

☐ _____

☐ _____

TRANSPORTATION

☐ taxi

☐ public transport

☐ gas

☐ car

☐ _____

☐ _____

spending categories & tags

monthly budget

month & year: _____

spending goal: _____

savings goal: _____

INCOME		
date	source	amount
		\$
		\$
		\$
total		\$

NOTES

FIXED EXPENSES		
date	description	amount
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
total		\$

VARIABLE EXPENSES		
date	description	amount
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
total		\$

	BUDGETED	ACTUAL	DIFFERENCE
TOTAL INCOME			
TOTAL EXPENSES			
TOTAL SAVINGS			

monthly budget

INCOME		
date	source	amount
		\$
		\$
		\$

NOTES

HOUSING & UTILITIES		
date	description	amount
	Mortgage & Rent	\$
	Electrical & Gas	\$
	Water	\$
	Internet & Cable	\$
	Trash & Recycling	\$
	Phone	\$
		\$
total		\$

TRANSPORTATION		
date	description	amount
	Car Payment	\$
	Auto Insurance	\$
	Gas	\$
	Maintenance	\$
		\$
total		\$

ENTERTAINMENT		
date	description	amount
	Subscriptions	\$
		\$
		\$
		\$
		\$
		\$
		\$
total		\$

GROCERIES		
date	description	amount
		\$
		\$
		\$
		\$
		\$
total		\$

INSURANCE		
date	description	amount
	Homeowners	\$
	Health	\$
	Life	\$
		\$
total		\$

DEBT		
date	description	amount
		\$
		\$
		\$
		\$
		\$
total		\$

DINING OUT		
date	description	amount
		\$
		\$
		\$
		\$
total		\$

MISCELLANEOUS		
date	description	amount
		\$
		\$
		\$
		\$
		\$
total		\$

SAVINGS		
date	description	amount
		\$
		\$
		\$
		\$
		\$
total		\$

monthly budget

INCOME		
date	source	amount
		\$
		\$
		\$

NOTES

HOUSING & UTILITIES		
date	description	amount
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
total		\$

TRANSPORTATION		
date	description	amount
		\$
		\$
		\$
		\$
		\$
		\$
total		\$

ENTERTAINMENT		
date	description	amount
		\$
		\$
		\$
		\$
		\$
		\$
		\$
total		\$

GROCERIES		
date	description	amount
		\$
		\$
		\$
		\$
		\$
total		\$

INSURANCE		
date	description	amount
		\$
		\$
		\$
total		\$

DEBT		
date	description	amount
		\$
		\$
		\$
		\$
total		\$

DINING OUT		
date	description	amount
		\$
		\$
		\$
total		\$

MISCELLANEOUS		
date	description	amount
		\$
		\$
		\$
		\$
total		\$

SAVINGS		
date	description	amount
		\$
		\$
		\$
		\$
total		\$

monthly goal setting

end of: _____

spent	goal
\$	\$

spent	goal
\$	\$

spent	goal
\$	\$

spent	goal
\$	\$

spent	goal
\$	\$

spent	goal
\$	\$

spent	goal
\$	\$

spent	goal
\$	\$

I DID WELL ON

I NEED TO IMPROVE ON

spending tracker

[illegible]

daily spending tracker

week of: _____

MONDAY		
item	category	amount
		\$
		\$
		\$
		\$
		\$
total		\$

TUESDAY		
item	category	amount
		\$
		\$
		\$
		\$
		\$
total		\$

WEDNESDAY		
item	category	amount
		\$
		\$
		\$
		\$
		\$
total		\$

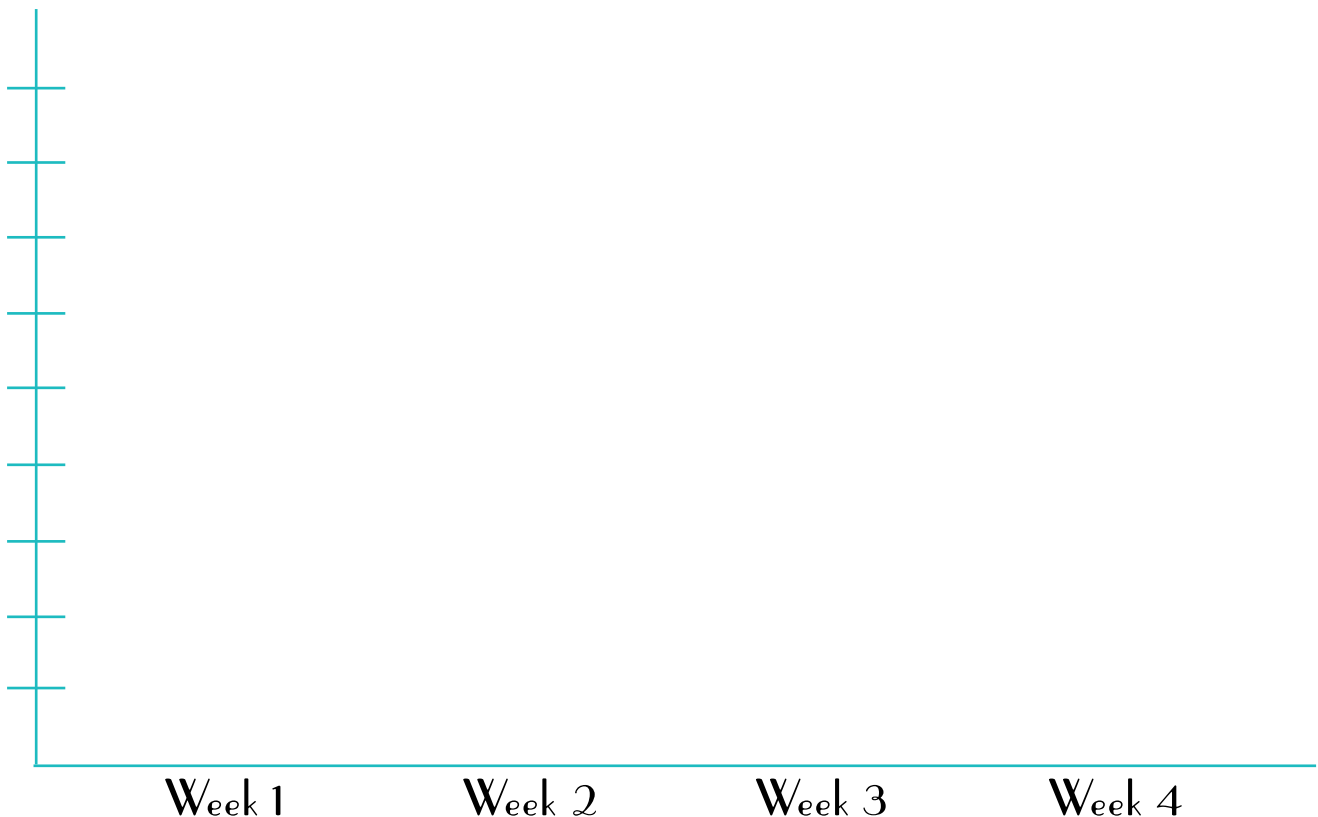
THURSDAY		
item	category	amount
		\$
		\$
		\$
		\$
		\$
total		\$

FRIDAY		
item	category	amount
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
total		\$

SATURDAY & SUNDAY		
item	category	amount
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
total		\$

week-to-week spending tracker

Category or Tag >>							TOTAL
WEEK 1							
WEEK 2							
WEEK 3							
WEEK 4							
TOTAL							



no spend challenge

LENGTH OF TIME:

FROM:

TO:

REASON:

NO BUY LIST:

EXEMPTIONS:

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

no spend reflection

OF
NO SPEND
DAYS

OF
MESS-UPS

TOTAL
SPENT

WHAT I LEARNED:

WAYS I CAN IMPROVE:

MOVING FORWARD I WILL

52 weeks savings log

WEEK	AMOUNT	DONE ✓	BALANCE	WEEK	AMOUNT	DONE ✓	BALANCE
1		○	\$	27		○	\$
2		○	\$	28		○	\$
3		○	\$	29		○	\$
4		○	\$	30		○	\$
5		○	\$	31		○	\$
6		○	\$	32		○	\$
7		○	\$	33		○	\$
8		○	\$	34		○	\$
9		○	\$	35		○	\$
10		○	\$	36		○	\$
11		○	\$	37		○	\$
12		○	\$	38		○	\$
13		○	\$	39		○	\$
14		○	\$	40		○	\$
15		○	\$	41		○	\$
16		○	\$	42		○	\$
17		○	\$	43		○	\$
18		○	\$	44		○	\$
19		○	\$	45		○	\$
20		○	\$	46		○	\$
21		○	\$	47		○	\$
22		○	\$	48		○	\$
23		○	\$	49		○	\$
24		○	\$	50		○	\$
25		○	\$	51		○	\$
26		○	\$	52		○	\$

my savings tracker

REASON:

GOAL AMOUNT:

START BALANCE:

TARGET DATE:



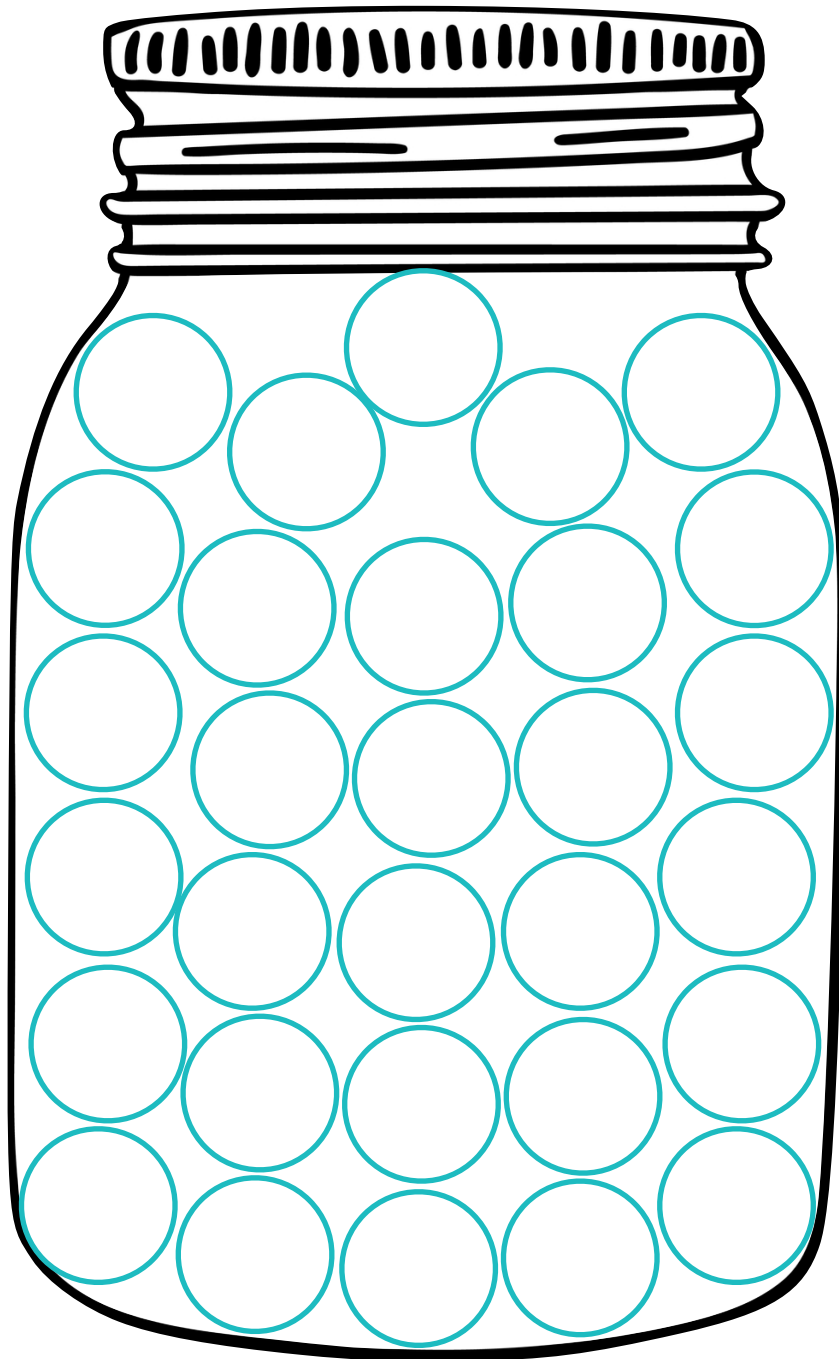
my savings tracker

REASON:

GOAL AMOUNT:

TARGET DATE:

EACH ○ = \$



emergency fund calculator

enter your monthly costs for each of the following:

HOUSING & UTILITIES	
Rent or Mortgage	\$
Property Taxes	\$
Home Insurance	\$
Utilities	\$
	\$
	\$

TRANSPORTATION	
Car Payments	\$
Car Insurance	\$
Gas	\$
Public Transportation	\$
Other (tolls, parking, etc.)	\$
	\$

MEDICAL	
Health Insurance	\$
Prescriptions	\$
Life Insurance	\$
	\$

DEBT	
Credit Card Payment	\$
Student Loan Payments	\$
Other	\$
	\$

FOOD	
Groceries	\$
	\$

MISCELLANEOUS	
	\$
	\$

TOTAL:

x3
MONTHS =

x6
MONTHS =

x12
MONTHS =

emergency fund tracker

○ = \$ _____

○	○	○	○	○	○
○	○	○	○	○	○
○	○	○	○	○	○
○	○	○	○	○	○
○	○				
○	○				
○	○				
○	○				



rainy day fund tracker



house savings tracker

GOAL AMOUNT:

START BALANCE:

TARGET DATE:



travel money tracker

GOAL AMOUNT:

START BALANCE:

TARGET DATE:

Hello World!

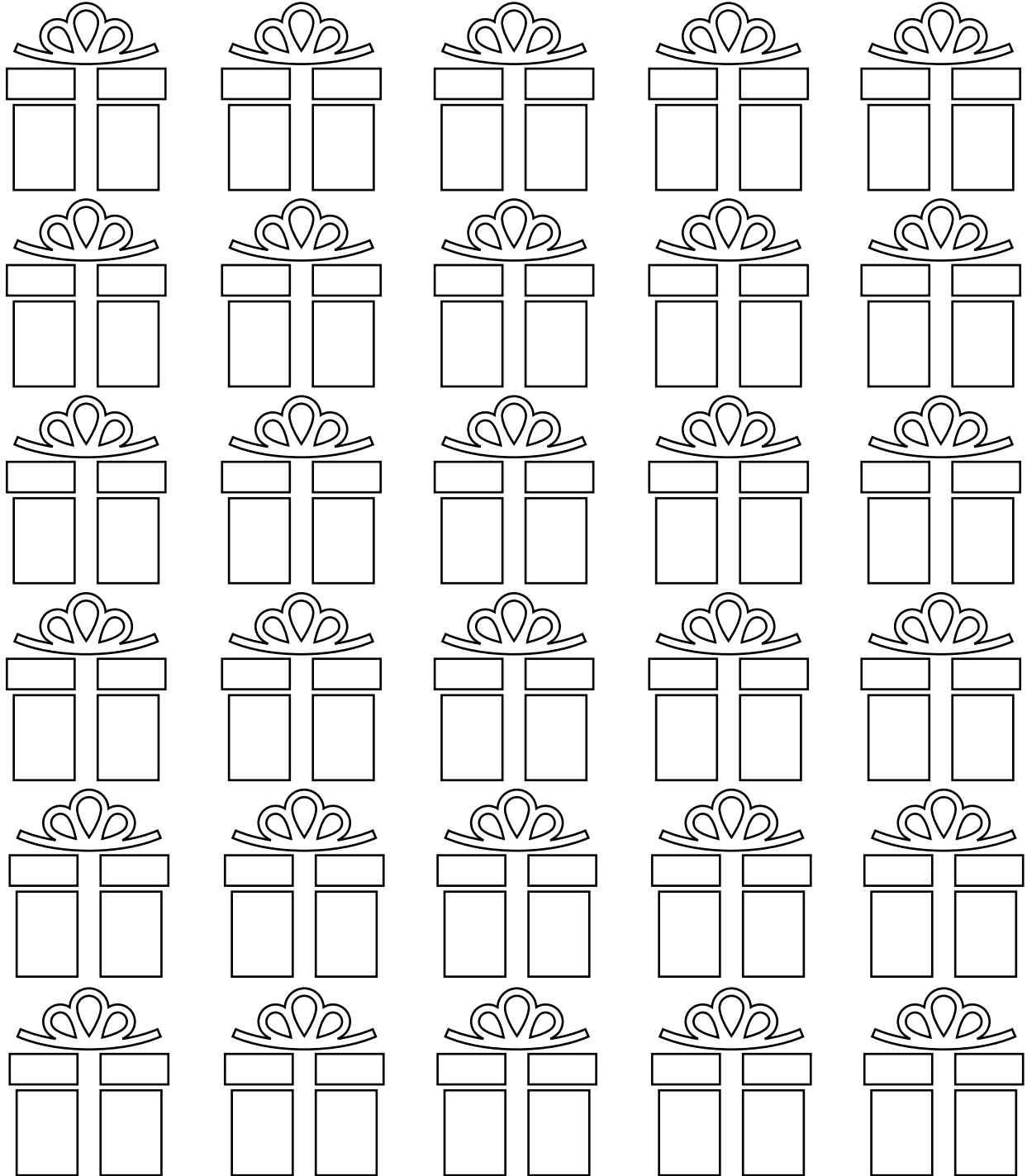


holiday savings tracker

GOAL AMOUNT:

TARGET DATE:

EACH  = \$



\$1000 savings Tracker

Here we go!

\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10
\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10	\$10

\$3000 savings Tracker

Here we go!

\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30
\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30
\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30
\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30
\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30
\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30
\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30
\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30
\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30
\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30	\$30

5k savings challenge

\$5,000 in 52 Weeks!

\$50	\$55	\$45	\$85	\$40	\$70	\$125
\$60	\$50	\$65	\$135	\$130	\$80	\$55
\$85	\$45	\$95	\$140	\$150	\$65	\$50
\$90	\$70	\$155	\$95	\$100	\$75	\$165
\$55	\$80	\$105	\$170	\$65	\$90	\$110
\$165	\$65	\$90	\$150	\$70	\$115	\$95
\$120	\$75	\$155	\$80	\$145	\$125	\$100
\$145	\$130	\$75				

10k savings challenge

\$10,000 in 52 Weeks!

\$150	\$75	\$100	\$220	\$150	\$175	\$205
\$225	\$150	\$175	\$275	\$225	\$155	\$95
\$275	\$225	\$75	\$175	\$200	\$225	\$250
\$175	\$275	\$225	\$170	\$275	\$200	\$230
\$225	\$80	\$120	\$225	\$150	\$175	\$200
\$225	\$70	\$275	\$200	\$225	\$150	\$175
\$210	\$230	\$175	\$155	\$205	\$225	\$255
\$230	\$250	\$220				



YNOT SOLUTIONS

NYC