

WEALTH DIARY 2024



BUDGET AND INVESTMENT PLANNER 2024

“When money realizes that it is in good hands, it wants to stay and multiply in those hands.”

— IDOWU KOYENIKAN

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DEAR SELF, THIS YEAR WANT TO:

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2024

January

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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			

February

Su	Mo	Tu	We	Th	Fr	Sa
				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		

March

Su	Mo	Tu	We	Th	Fr	Sa
					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						

April

Su	Mo	Tu	We	Th	Fr	Sa
	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				

May

Su	Mo	Tu	We	Th	Fr	Sa
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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	

June

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
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16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

July

Su	Mo	Tu	We	Th	Fr	Sa
	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			

August

Su	Mo	Tu	We	Th	Fr	Sa
				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

September

Su	Mo	Tu	We	Th	Fr	Sa
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					

October

Su	Mo	Tu	We	Th	Fr	Sa
		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		

November

Su	Mo	Tu	We	Th	Fr	Sa
					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

December

Su	Mo	Tu	We	Th	Fr	Sa
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				

YEAR overview

	INCOME	SAVINGS	INVESTMENT	DEBT PAID	EXPENSES
JAN					
FEB					
MAR					
APR					
MAY					
JUN					
JUL					
AUG					
SEP					
OCT					
NOV					
DEC					

FINANCIAL *goals*

1

2

3

4

5

6

GOAL action plan

2

start date

end date

Action Plan

action step	starting date	end date

motivation

reflection

what am I doing well?

what can I improve on?

progress bar

GOAL action plan

3

start date

end date

Action Plan

action step	starting date	end date

motivation

reflection

what am I doing well?

what can I improve on?

progress bar

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GOAL action plan

6

start date

end date

Action Plan

action step	starting date	end date

motivation

reflection

what am I doing well?

what can I improve on?

progress bar

SAVINGS *overview*

saving for:

motivation:

amount

start date

target date

saving for:

motivation:

amount

start date

target date

saving for:

motivation:

amount

start date

target date

saving for:

motivation:

amount

start date

target date

saving for:

motivation:

amount

start date

target date

saving for:

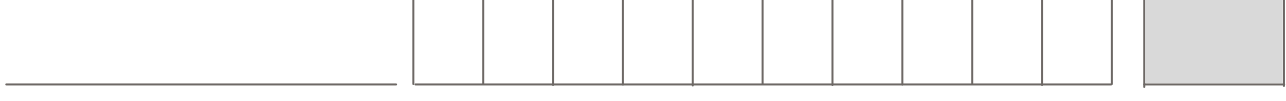
motivation:

amount

start date

target date

SAVINGS progress



INVESTMENT *overview*

investing for:

motivation:

amount

start date

target date

investing for:

motivation:

amount

start date

target date

investing for:

motivation:

amount

start date

target date

2 years investment goal:

motivation:

amount

start date

target date

5 years investment goal:

motivation:

amount

start date

target date

10 years investment goal:

motivation:

amount

start date

target date

DEBT

overview

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

DEBT

overview

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

creditor
balance date
interest rate
credit limit
minimum payment
payment amount target date

DEBT

progress

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creditor

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creditor

DEBT

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creditor

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creditor

STOCK WATCHLIST

NAME OF STOCK	REASON TO BUY	INVESTMENT TARGET (number of shares)	HOLDING PERIOD

"Time in the market, beats timing the market."
Ken Fisher, founder of Fisher Investments

TRAVEL BUDGET PLANNER

DESTINATION	
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TRAVEL DATES	
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TRANSPORTATION		
expenses	budget	actual
Total:		

ACTIVITIES		
expenses	budget	actual
Total:		

ACCOMMODATION		
expenses	budget	actual
Total:		

PRE-TRIP EXPENSES		
expenses	budget	actual
Total:		

FOOD & DRINK		
expenses	budget	actual
Total:		

OTHER		
expenses	budget	actual
Total:		

NOTES

GRAND TOTAL	budget	actual

TRAVEL BUDGET PLANNER

DESTINATION	
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TRAVEL DATES	
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TRANSPORTATION		
expenses	budget	actual
Total:		

ACTIVITIES		
expenses	budget	actual
Total:		

ACCOMMODATION		
expenses	budget	actual
Total:		

PRE-TRIP EXPENSES		
expenses	budget	actual
Total:		

FOOD & DRINK		
expenses	budget	actual
Total:		

OTHER		
expenses	budget	actual
Total:		

NOTES

GRAND TOTAL	budget	actual

TRAVEL BUDGET PLANNER

DESTINATION	
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TRAVEL DATES	
---------------------	--

TRANSPORTATION		
expenses	budget	actual
Total:		

ACTIVITIES		
expenses	budget	actual
Total:		

ACCOMMODATION		
expenses	budget	actual
Total:		

PRE-TRIP EXPENSES		
expenses	budget	actual
Total:		

FOOD & DRINK		
expenses	budget	actual
Total:		

OTHER		
expenses	budget	actual
Total:		

NOTES

GRAND TOTAL	budget	actual

TRAVEL BUDGET PLANNER

DESTINATION	
--------------------	--

TRAVEL DATES	
---------------------	--

TRANSPORTATION		
expenses	budget	actual
Total:		

ACTIVITIES		
expenses	budget	actual
Total:		

ACCOMMODATION		
expenses	budget	actual
Total:		

PRE-TRIP EXPENSES		
expenses	budget	actual
Total:		

FOOD & DRINK		
expenses	budget	actual
Total:		

OTHER		
expenses	budget	actual
Total:		

NOTES

GRAND TOTAL	budget	actual

NO SPEND CHALLENGE

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YOU DID IT!

NOTES

52 WEEKS SAVINGS

WEEK	DEPOSIT	BALANCE	DONE	WEEK	DEPOSIT	BALANCE	DONE
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			

January

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	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			

notes:

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

February

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Wed

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Fri

Sat

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11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

notes:

February Transactions

date	income	expenses	savings	debt	category	description	amount

TOTAL SPENT: _____

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

March

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Sat

31					1	2
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10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

notes:

April

Sun

Mon

Tue

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Sat

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

notes:

April Budget

income source	BUDGET	ACTUAL

savings	BUDGET	ACTUAL

expenses	BUDGET	ACTUAL

Investment funds	BUDGET	ACTUAL

debt	BUDGET	ACTUAL

TOTAL	BUDGET	ACTUAL
income		
expenses		
savings		
Investment funds		
debt		
remaining		

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

May

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			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	

notes:

May Budget

income source BUDGET ACTUAL

	BUDGET	ACTUAL

savings BUDGET ACTUAL

	BUDGET	ACTUAL

expenses BUDGET ACTUAL

	BUDGET	ACTUAL

Investment funds BUDGET ACTUAL

	BUDGET	ACTUAL

debt BUDGET ACTUAL

	BUDGET	ACTUAL

TOTAL BUDGET ACTUAL

	BUDGET	ACTUAL
income		
expenses		
savings		
Investment funds		
debt		
remaining		

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

June

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30						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

notes:

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

July

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	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			

notes:

July Transactions

date	<i>income</i>	<i>expenses</i>	<i>savings</i>	<i>debt</i>	category	description	amount

TOTAL SPENT:

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

August

Sun

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Sat

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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

notes:

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

September

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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					

notes:

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

October

Sun

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Sat

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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		

notes:

October Budget

income source BUDGET ACTUAL

	BUDGET	ACTUAL

savings

BUDGET ACTUAL

	BUDGET	ACTUAL

expenses

BUDGET ACTUAL

	BUDGET	ACTUAL

Investment funds

BUDGET ACTUAL

	BUDGET	ACTUAL

debt

BUDGET ACTUAL

	BUDGET	ACTUAL

TOTAL

BUDGET ACTUAL

income		
expenses		
savings		
Investment funds		
debt		
remaining		

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

November

Sun

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Wed

Thu

Fri

Sat

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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

notes:

November Budget

income source BUDGET ACTUAL

	BUDGET	ACTUAL

savings

BUDGET ACTUAL

	BUDGET	ACTUAL

expenses

BUDGET ACTUAL

	BUDGET	ACTUAL

Investment funds

BUDGET ACTUAL

	BUDGET	ACTUAL

debt

BUDGET ACTUAL

	BUDGET	ACTUAL

TOTAL

BUDGET ACTUAL

income		
expenses		
savings		
Investment funds		
debt		
remaining		

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

December

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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				

notes:

December Budget

income source	BUDGET	ACTUAL

savings	BUDGET	ACTUAL

expenses	BUDGET	ACTUAL

Investment funds	BUDGET	ACTUAL

debt	BUDGET	ACTUAL

TOTAL	BUDGET	ACTUAL
income		
expenses		
savings		
Investment funds		
debt		
remaining		

Monthly To-Do-List

TO DO

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PRIORITIES

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NOTES

REMINDER

NET WORTH TRACKER

2024

INCOME SOURCES	R	EXPENSE CATEGORY	R
CASH		HOUSE BOND	
SAVING ACCOUNT		CAR LOAN	
INVESTMENTS		PERSONAL LOANS	
MARKET VALUE HOME		CREDIT CARD	
MARKET VALUE CAR		CLOTHING CREDIT	
OTHER ASSITS:		OTHER DEBTS	
TOTAL		TOTAL	

NET WORTH:

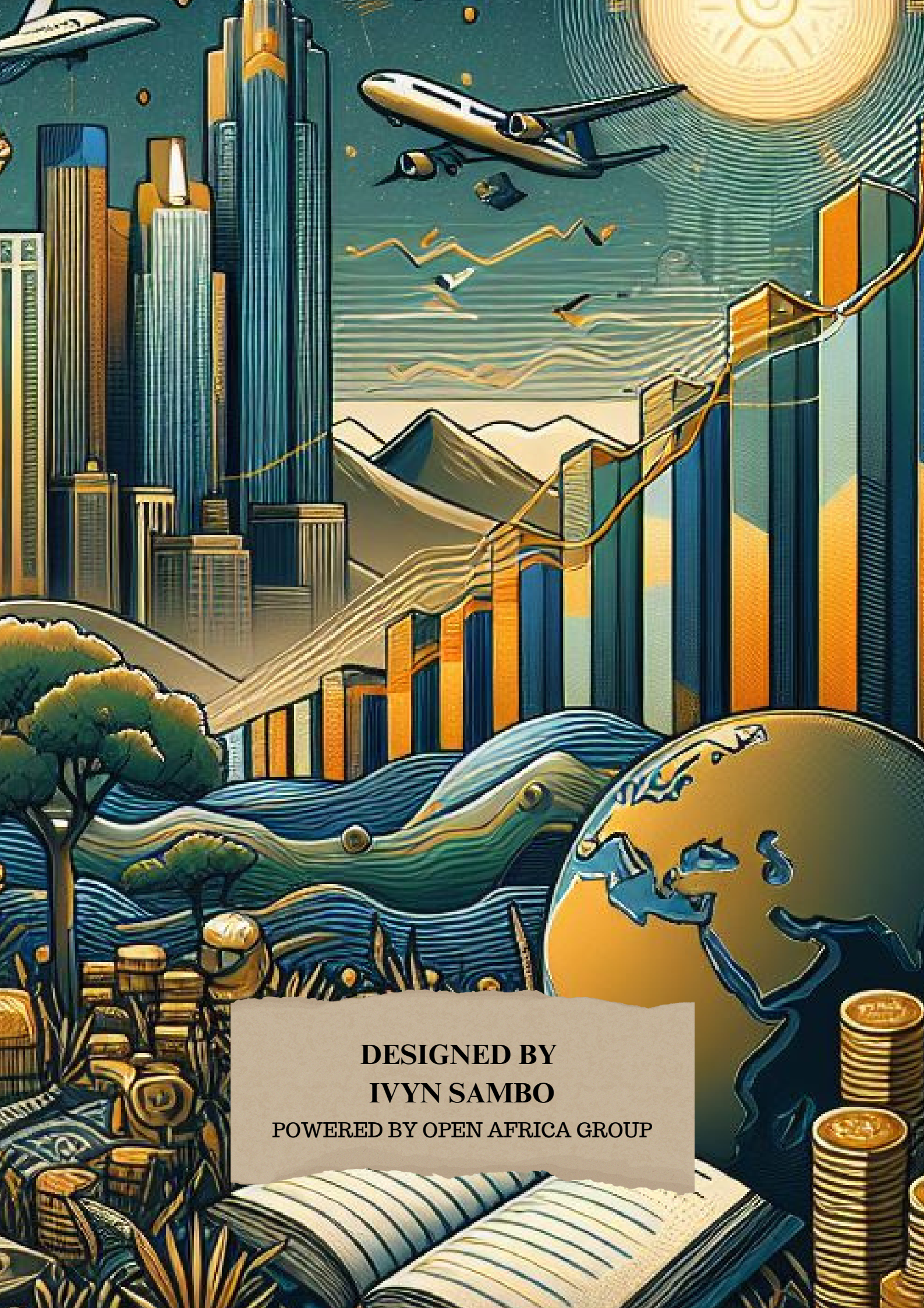
ASSETS & DEBT	THIS YEAR	LAST YEAR
TOTAL ASSET		
TOTAL DEBT		
NET WORTH		

“When your self-worth goes up, your net worth goes up with it.”

Mark Victor Hansen

Notes

A series of 25 horizontal dashed lines for writing notes.



**DESIGNED BY
IVYN SAMBO**

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