

# Finance & Budget Worksheet

-EZ Way To Saving Money & Building Wealth-

**\*\*Name:\*\*** \_\_\_\_\_

**\*\*Date:\*\*** \_\_\_\_\_

+Budgeting Basics+

## 1. Monthly Income

- List all sources of income (e.g., allowance, part-time job, etc.):

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- Total Monthly Income: \_\_\_\_\_

## 2. Monthly Expenses

- List your typical monthly expenses (e.g., transportation, entertainment, etc.):

- **\*\*Category\*\***                      **\*\*Amount (per month)\*\***

1. \_\_\_\_\_ \$ \_\_\_\_\_

2. \_\_\_\_\_ \$ \_\_\_\_\_

3. \_\_\_\_\_ \$ \_\_\_\_\_

4. \_\_\_\_\_ \$ \_\_\_\_\_

5. \_\_\_\_\_ \$ \_\_\_\_\_

Total Monthly Expenses: \$ \_\_\_\_\_

## 3. Calculate Savings

- Calculate your monthly savings:

Total Monthly Income - Total Monthly Expenses = Monthly Savings

\$ \_\_\_\_\_ - \$ \_\_\_\_\_ = \$ \_\_\_\_\_

+Savings Goals+

1. Short-Term Goals (0-6 months)

- List three short-term financial goals:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- Estimated Cost for Each Goal:

1. \$\_\_\_\_\_

2. \$\_\_\_\_\_

3. \$\_\_\_\_\_

2. Mid-Term Goals (6 months - 2 years)

- List three mid-term financial goals:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- Estimated Cost for Each Goal:

1. \$\_\_\_\_\_

2. \$\_\_\_\_\_

3. \$\_\_\_\_\_

3. Long-Term Goals (2+ years)

- List three long-term financial goals:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

- Estimated Cost for Each Goal:

1. \$\_\_\_\_\_

2. \$\_\_\_\_\_

3. \$\_\_\_\_\_

+Saving Strategies+

1. Ways to Increase Savings

- List three strategies to increase your savings:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

2. Ways to Cut Expenses

- List three ways to cut down on unnecessary expenses:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

+Reflection+

- What did you learn from creating this budget and setting savings goals?

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EZ Money by HolHealth Inc.

