

Money Management System



DATE: _____

FOR _____

2. Fixed Expenses

\$ _____

Note Box

	_____ % of income
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3. Variable Expenses

\$ _____

Note Box

_____ % of income	
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4. Cash Savings

Account	Funding

Total \$ _____

Saving Goals

	Savings _____ % of income
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\$ _____ Income
\$ _____ or _____ % Allocated
\$ _____ or _____ % Unallocated

5.

Goal	Funding

Total \$ _____

Goals

_____ % of income	
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6. Long-Term Investing (5+ years)

Account	Funding

Total \$ _____

Investing _____ % of income

Big Money Goals

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7. Retirement (Age 59 ½ +)

Account	Funding

Total \$ _____

Retirement _____ % of income

Retirement Goals

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8. Risk Management (Insurance Policies)

Policy	Insured	Premium

Total \$ _____

Risk _____ % of income

Reasons for Coverage

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