



2010 Financial Goals & Budget {cheat sheet}

EACH YEAR FILL OUT AND POST at your desk, corkboard, or other space where you will see this often. Use as a visual reminder to align your decisions and actions.

Long Term Financial Goals (describe):

Short Term Financial Goals (1-12 months)				Medium Term Financial Goals (1-5 years)			
GOAL	NEED BY	TOTAL AMOUNT	SAVE PER MONTH	GOAL	NEED BY	TOTAL AMOUNT	SAVE PER MONTH
①				①			
②				②			
③				③			

TRACKER (mark an X for each month where savings goals were achieved)

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

Monthly Budget

<u>INCOME</u>	2009 BENCHMARK	2010 BUDGET
Wages (net taxes)		
Other (interest income, support, etc)		
<u>EXPENSE CATEGORIES</u>	2009 BENCHMARK	2010 BUDGET
Mortgage/rent / homeowners association / insurance		
Utilities (electricity, gas, water, garbage, etc)		
Phone		
Food		
Clothing		
Childcare		
Auto (Insurance, payment, gas, tolls)		
Insurance Other (medical, dental)		
Healthcare		
TV/Internet		
Discretionary General (hair, books, eating out, education, travel)		
• Family Member 1		
• Family Member 2		
• Family Member 3		
• Family Member 4		