

Family Financial Overview



Total Income
\$1,820,299



Total Expenses
\$1,282,035



Net Balance
\$538,264



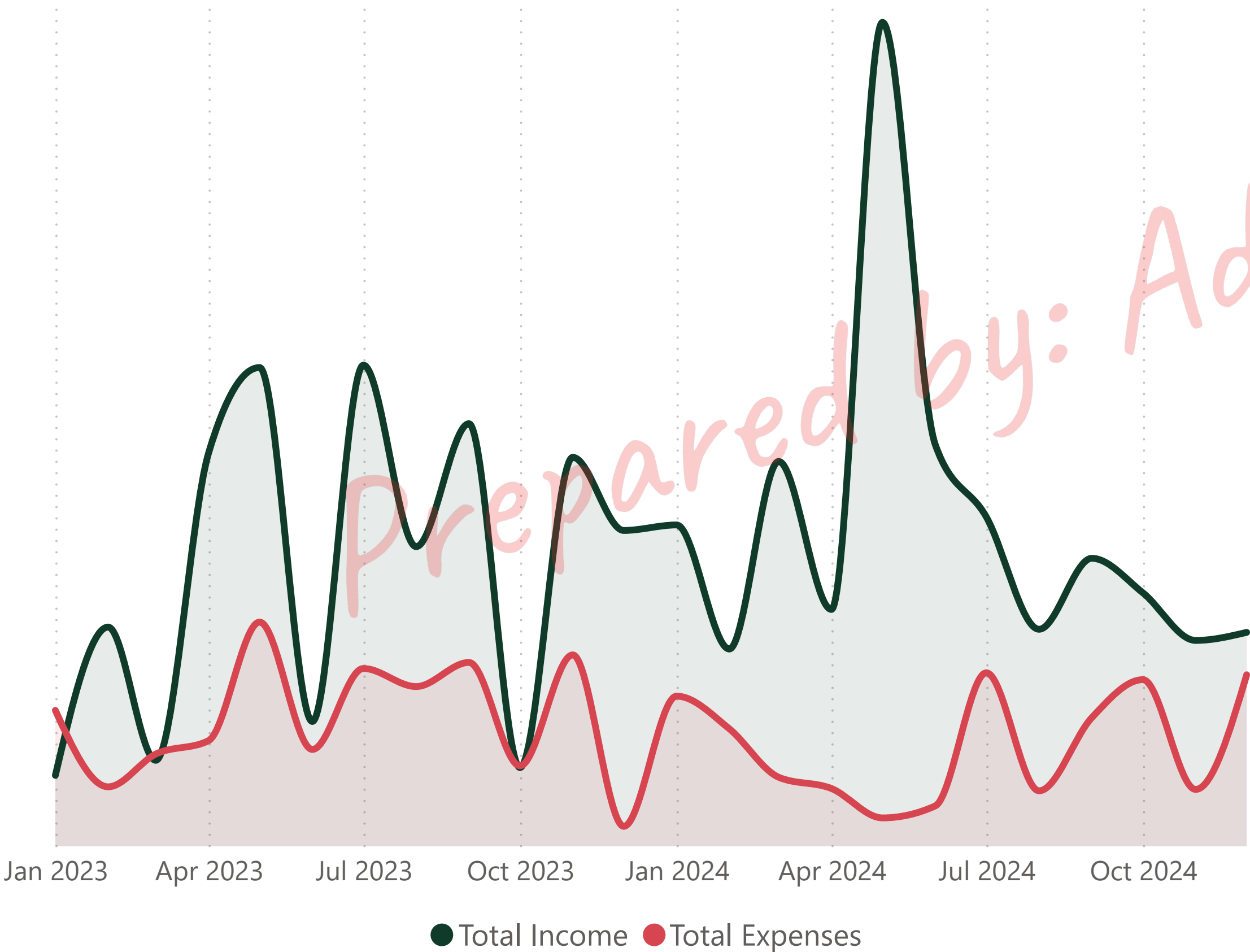
Savings Rate %
29.57%

Avg Monthly Income
\$151,692

Avg Monthly Expenses
\$106,836

Avg Monthly Balance
\$44,855

Total Income and Total Expenses by StartOfMonth



Income and Expenses by Year



- ☐ Ella (Daughter)
- ☐ Jake (Son)
- ☐ John (Dad)
- ☐ Mary (Mom)



Income

Expenses

Balance

Names

Category

Month

Ella

Books

Ella
\$452,927

Consulting
\$73,212

Jake
\$459,131

Freelancing
\$40,756

John
\$423,214

Gift
\$51,394

30.49%

Savings Rate %



Select a person

Jake

\$459,131

Total Income

\$319,138

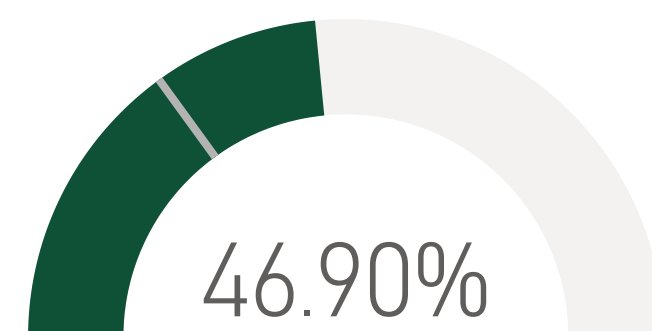
Total Expenses

\$139,993

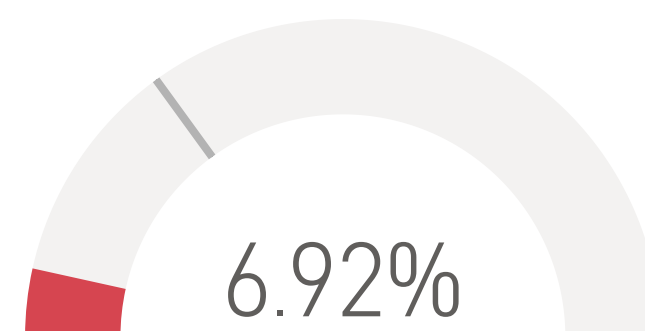
Net Balance

Savings and Balance Tracker

Saving Rate YTD vs 30% Target



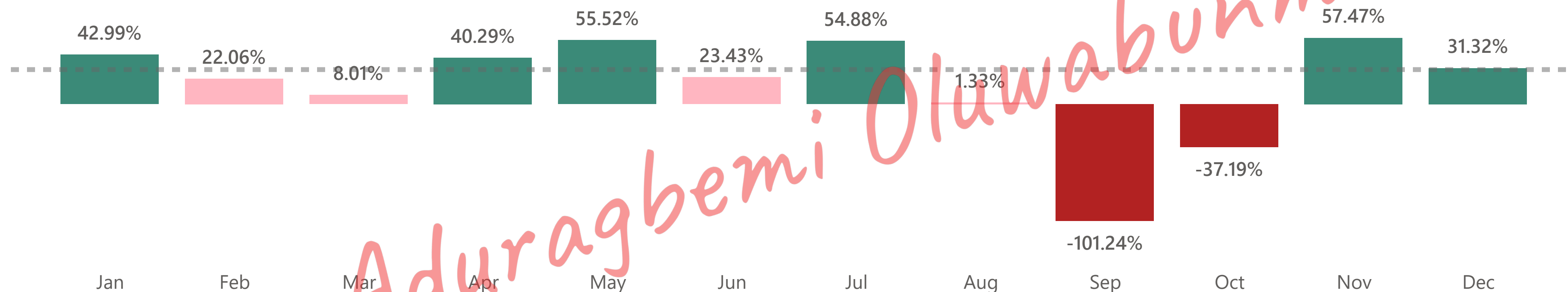
Saving Rate YTD vs 30% Target



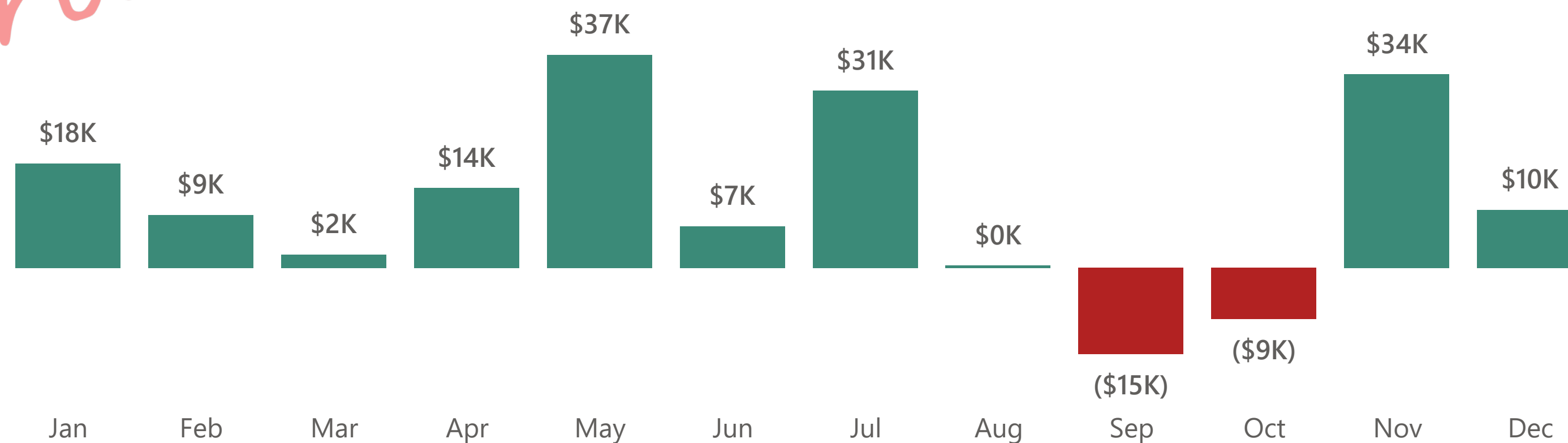
Savings Growth

577.73% ▲

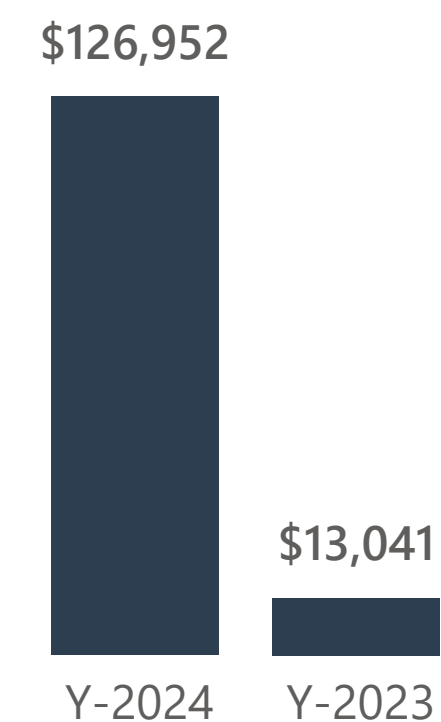
Savings Rate % by Month vs 30% Target



Net Balance by Month



Net Balance by Year

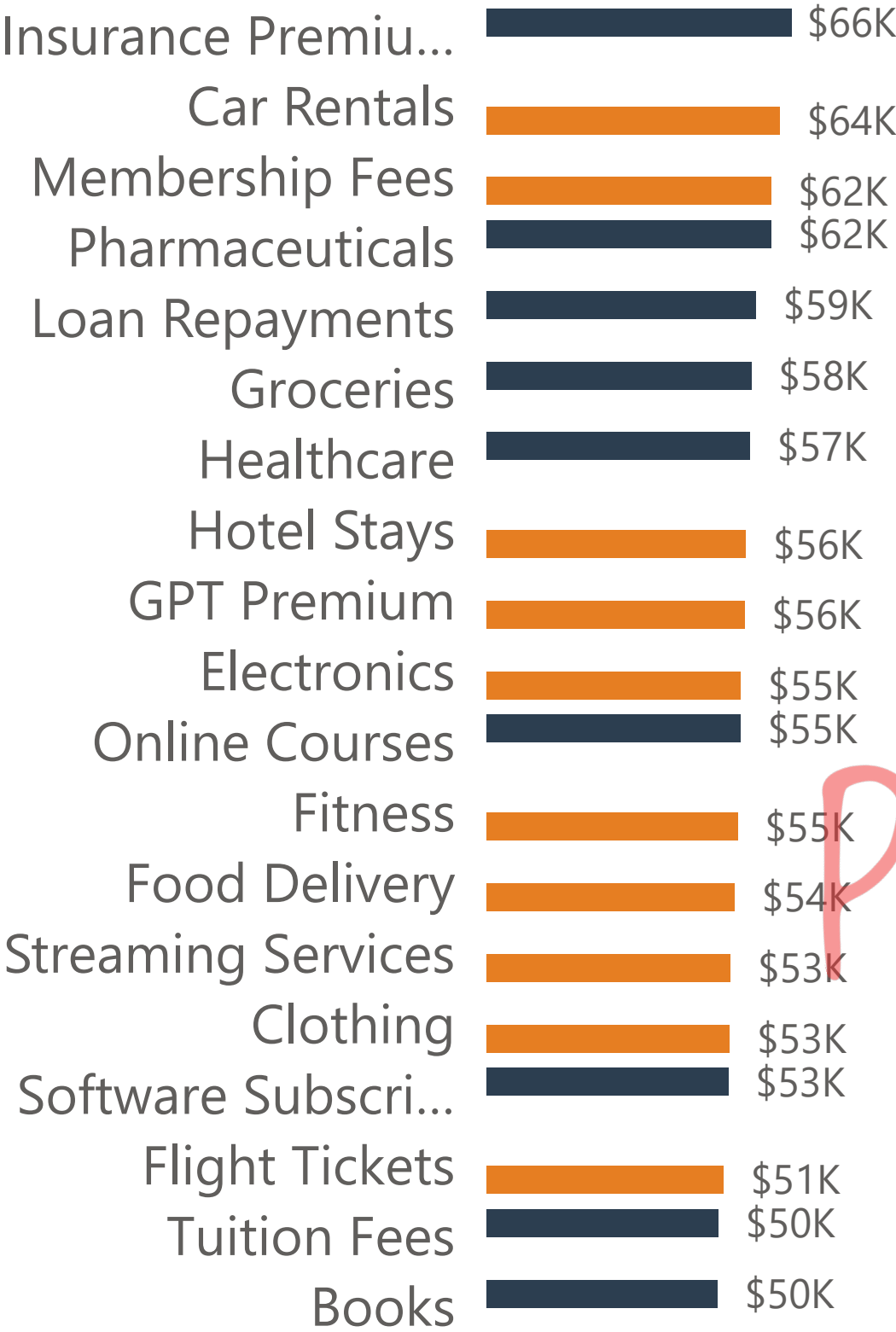


Individual & Category Analysis

- ☐ Ella (Daughter)
- ☐ Jake (Son)
- ☐ John (Dad)
- ☐ Mary (Mom)

Expenses by Category and Spending Type

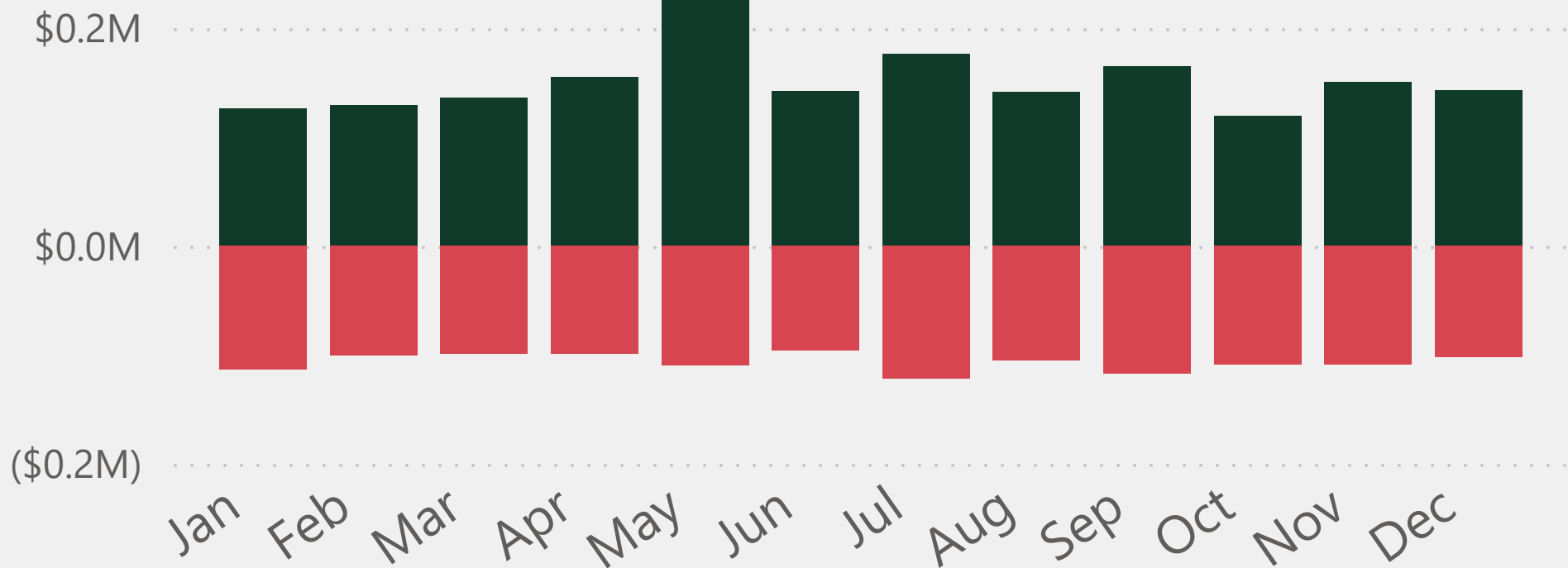
● Need ● Want



MonthSOMWeekDaily

Income vs Expenses on a Monthly Basis

● Total Income ● Reverse Total Expenses



Total Expenses Breakdown

Date	Description	Payment Method	Total
01-Jan-23	Co-working space	Bank Transfer	\$721
01-Jan-23	Laptop upgrade	Cash	\$1,104
01-Jan-23	Lunch with family	Bank Transfer	\$567
02-Jan-23	Car loan payment	Debit Card	\$1,430
02-Jan-23	Disney+	Credit Card	\$1,198
03-Jan-23	Amazon order	Mobile Payment	\$676
03-Jan-23	Car loan payment	Mobile Payment	\$169
03-Jan-23	Over-the-counter drugs	Mobile Payment	\$367
03-Jan-23	Personal loan	Mobile Payment	\$818
04-Jan-23	Laptop upgrade	Credit Card	\$163
04-Jan-23	Life insurance	Bank Transfer	\$781

Expenses

(\$1,282,035)

Monthly Average Expenses (\$106,836)

Income

\$1,820,299

Monthly Average Income \$151,692

Income vs Expenses by Category

