

Family Financial Overview



Total Income

\$1,820,299



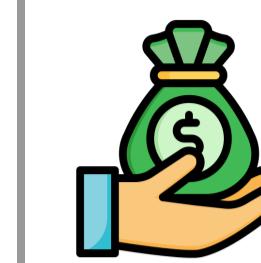
Total Expenses

\$1,282,035



Net Balance

\$538,264



Savings Rate %

29.57%

Avg Monthly Income

\$151,692

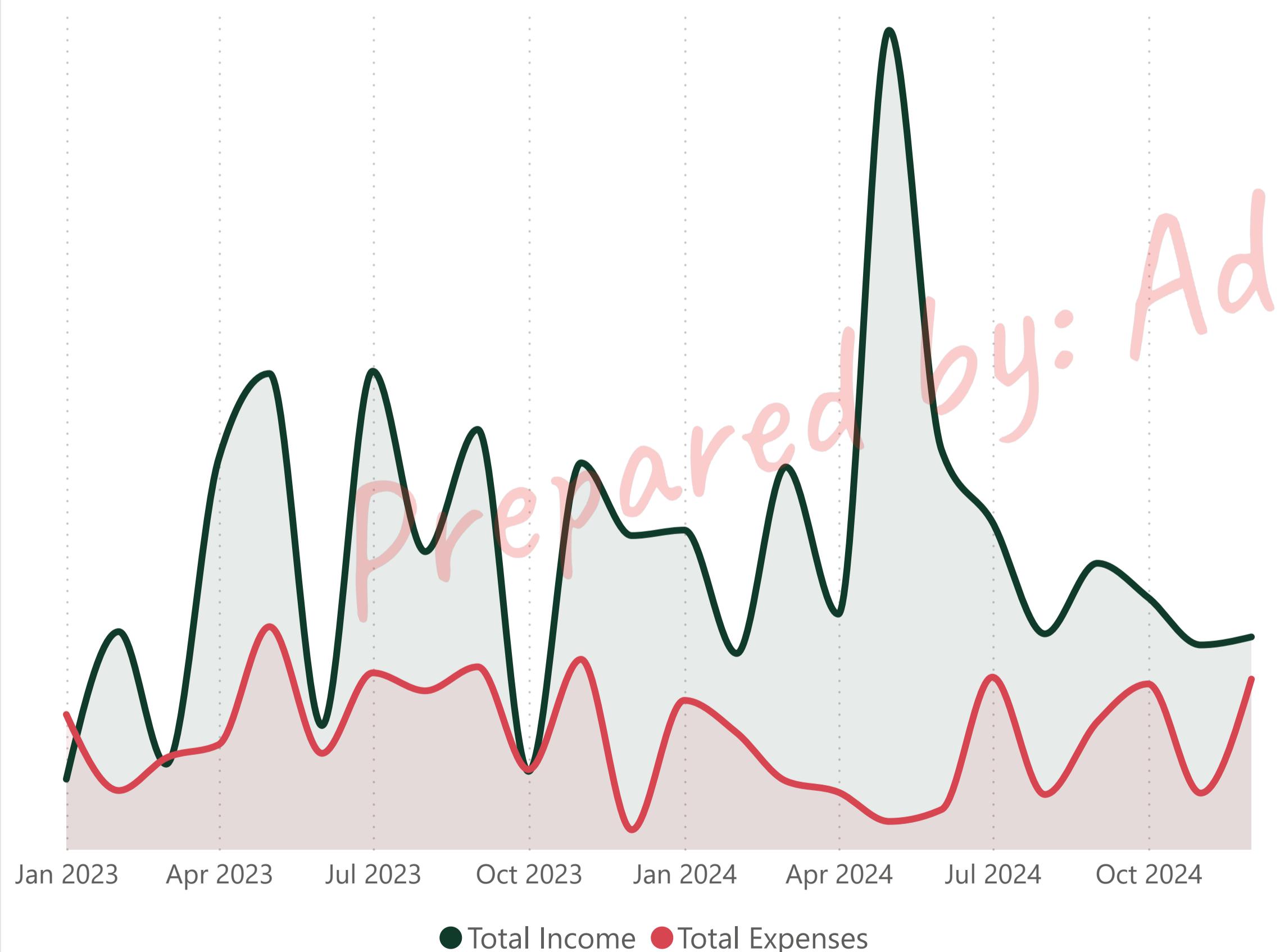
Avg Monthly Expenses

\$106,836

Avg Monthly Balance

\$44,855

Total Income and Total Expenses by StartOfMonth

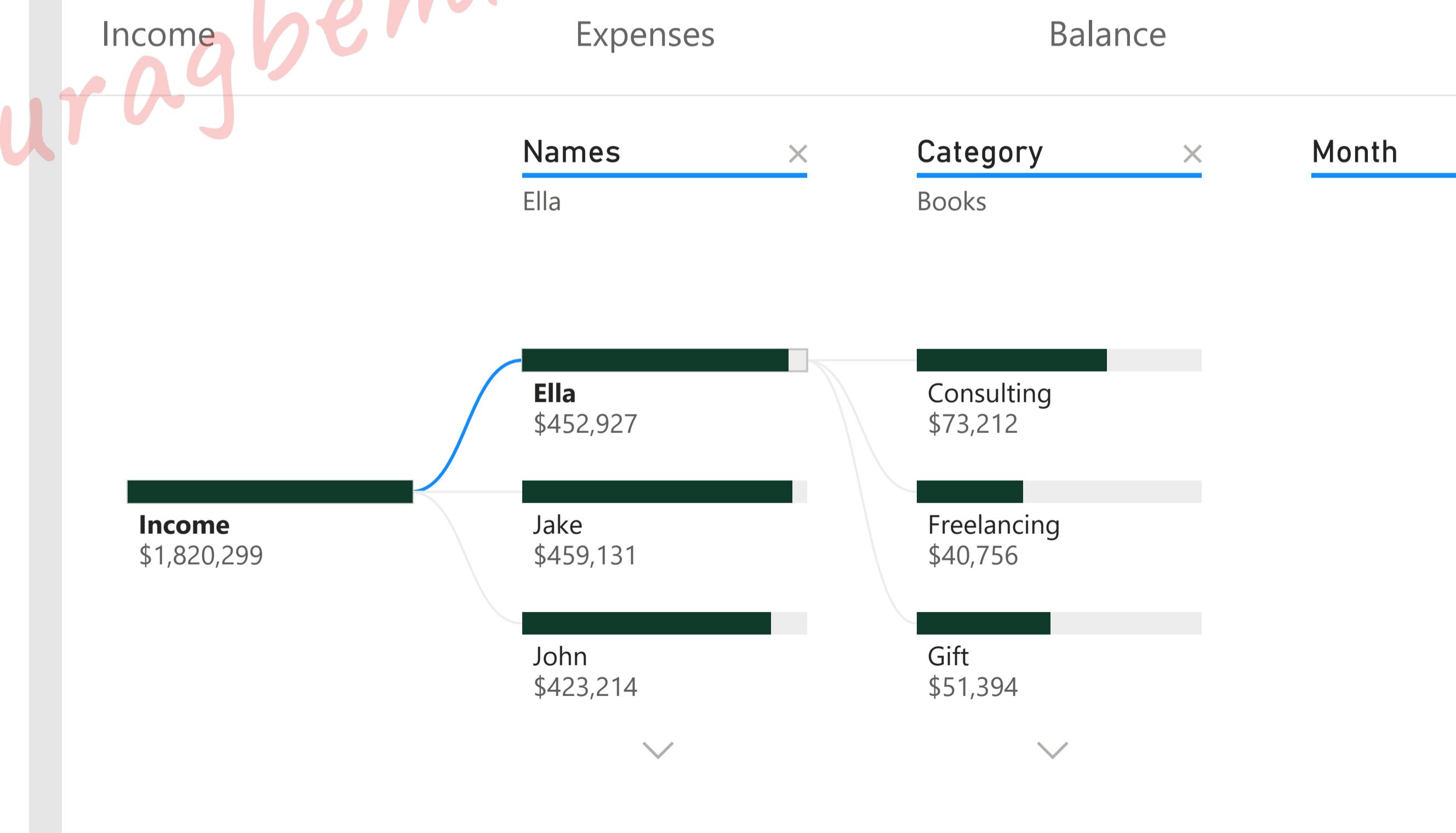


Income and Expenses by Year

| | | |
|--------|-----------|-----------|
| Y-2024 | \$940,969 | \$622,333 |
| Y-2023 | \$879,329 | \$659,702 |

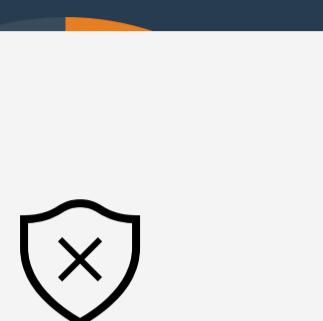
● Total Income ● Total Expenses

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



30.49%

Savings Rate %



Select a person

Jake ▾

\$459,131

Total Income

\$319,138

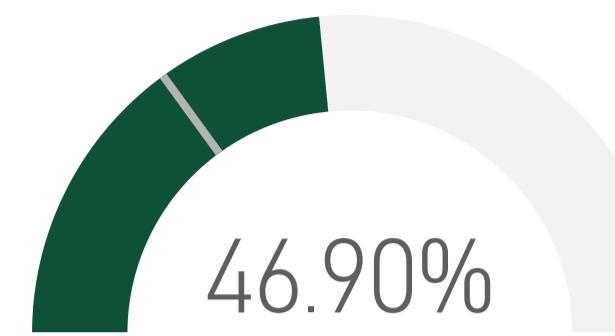
Total Expenses

\$139,993

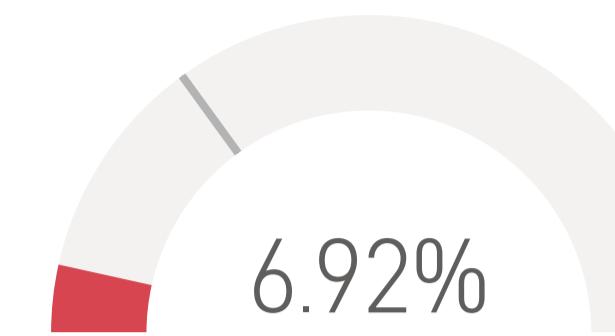
Net Balance

Savings and Balance Tracker

Saving Rate YTD vs 30% Target



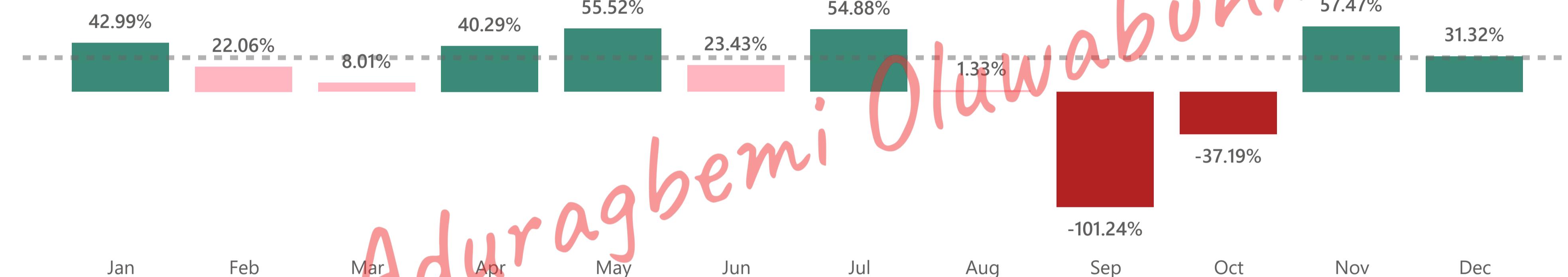
Saving Rate YTD vs 30% Target



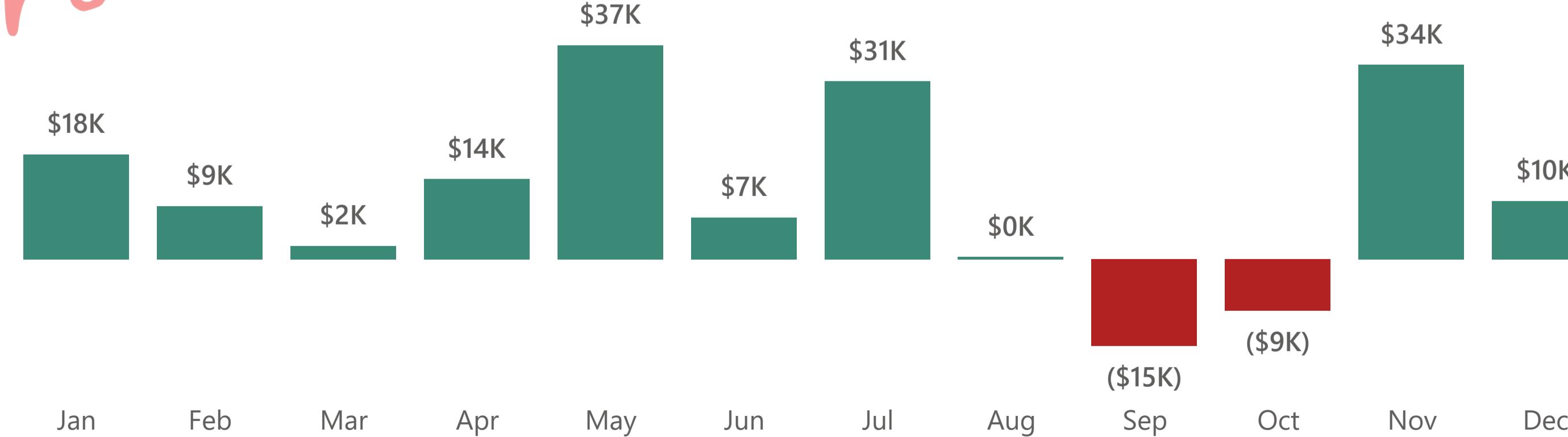
Savings Growth

577.73%

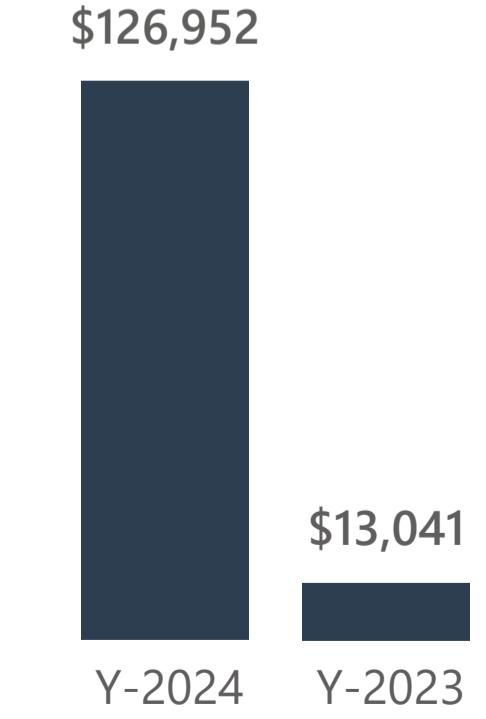
Savings Rate % by Month vs 30% Target



Net Balance by Month



Net Balance by Year



Prepared by: Aduragbemi Oluwabunmi

Individual & Category Analysis

Ella (Daughter)



Jake (Son)



John (Dad)

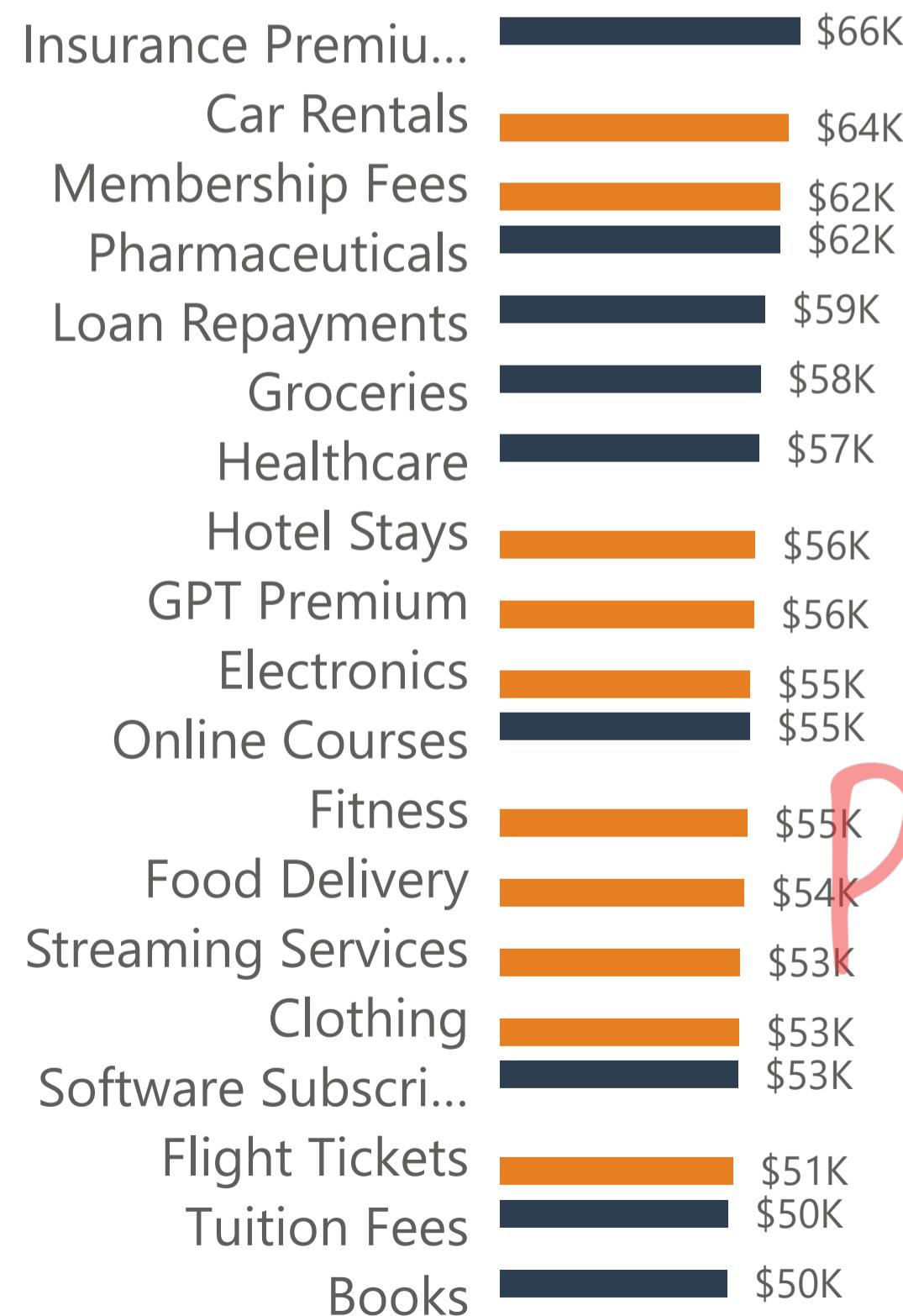


Mary (Mom)



Expenses by Category and Spending Type

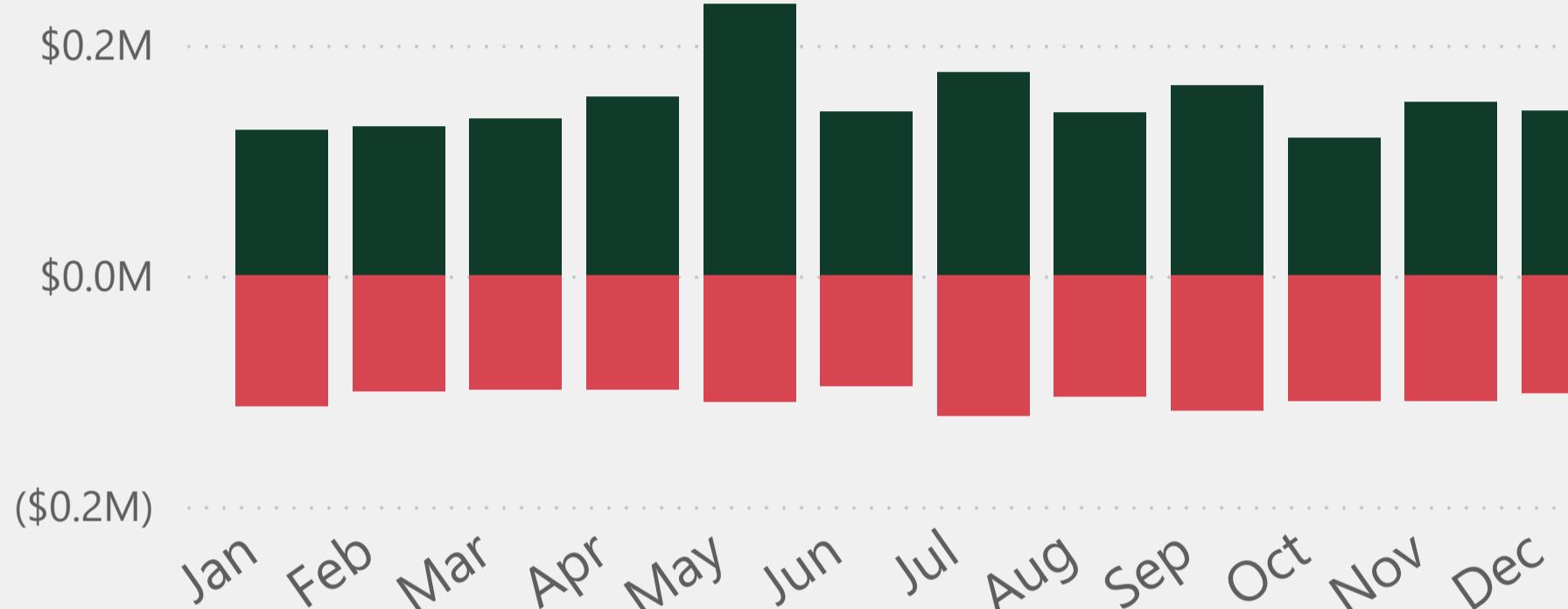
● Need ● Want



Month SOM Week Daily

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)

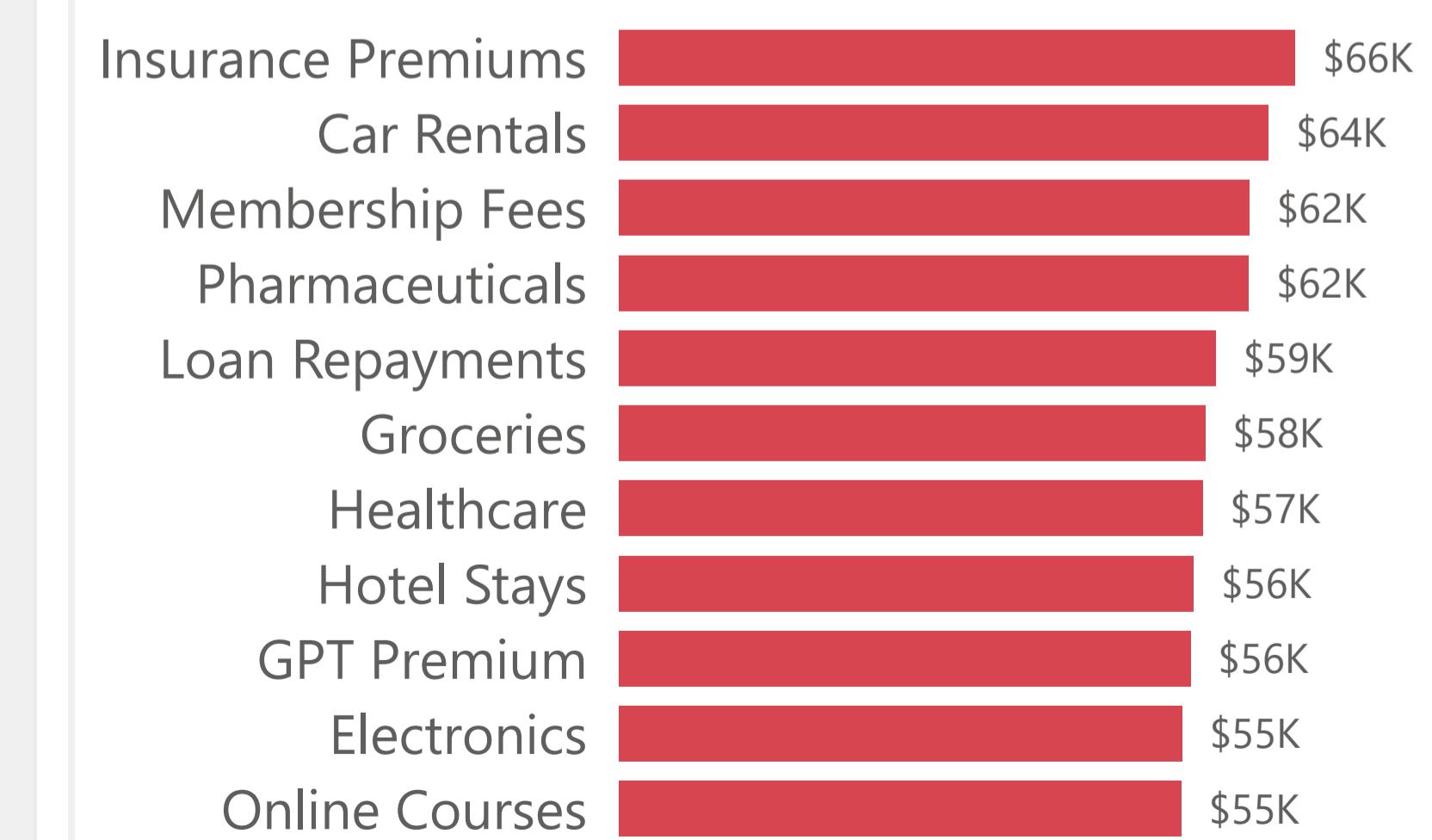
Monthly Average Expenses **(\$106,836)**

○ Income

\$1,820,299

Monthly Average Income **\$151,692**

Income vs Expenses by Category



Prepared by:

Aduragbemi

Oluwabunmi