

Budget Analysis: Monthly

My Key Financial Goals

This would be a set of user defined benchmarks they set in a different page using the user's own language. Examples include...

- Lower amount spent on takeout/fast food

| Difference | Target | Actual |
|--------------|--------------|--------------|
| +/- x amount | +/- x amount | +/- x amount |

- Get my savings account up to \$1000

| Difference | Target | Actual |
|--------------|--------------|--------------|
| +/- x amount | +/- x amount | +/- x amount |

For information on long-term liabilities and non-cash assets,
[CLICK HERE](#) to go to year overview.

Overview

Revenue

Difference

+/- x amount

Actual / Budget:
x amount / amount

Top 3 Variations: item 1, item 2,
item 3

Full List
Over/Under

Deficit/Surplus

Difference

+/- x amount

Actual / Budget:
x amount / amount

Top 3 Variations: item 1, item 2,
item 3

Full List
Over/Under

Expenses

Difference

+/- x amount

Actual / Budget:
x amount / amount

Top 3 Variations: item 1, item 2,
item 3

Full List
Over/Under

Short Term Liabilities

Difference

+/- x amount

Actual / Budget:
x amount / amount

Top 3 Variations: item 1, item 2,
item 3

Full List
Over/Under

Focused Look

Use this section to compare up to 3 different items in your budget with as little or more focus as you like. Select the highest level of focus you desire, and then make sure everything else to the right is selected as "Blank"

Measure Type

Account Type

Aggregated Account Name

Account Name

Item Name

Actual

Expense

Housing Expenses

Utilities

heating bill

1

Actual

Expense

Housing Expenses

Utilities

tv & phone bill

2

Actual

Expense

Housing Expenses

Utilities

water bill

3

Actual

Expense

Housing Expenses

Utilities