

2026 Financial Goals Worksheet

Set and achieve your financial goals this year. Break down big goals into actionable steps.

■ WHAT'S INCLUDED:

- SMART goal setting template
- Monthly action steps
- Progress tracking
- Quarterly review worksheets

MONTHLY BUDGET WORKSHEET

INCOME	AMOUNT
Salary/Wages	_____
Side Income	_____
Other Income	_____
TOTAL INCOME	_____

EXPENSES	BUDGETED	ACTUAL
Housing	_____	_____
Transportation	_____	_____
Food/Groceries	_____	_____
Utilities	_____	_____
Insurance	_____	_____
Debt Payments	_____	_____
Entertainment	_____	_____
Savings	_____	_____
Other	_____	_____
TOTAL EXPENSES	_____	_____

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