

# WealthWise Finance Planner

Complete Budgeting & Investment Tracking System

## MONTHLY BUDGET WORKSHEET

### Income Sources

Salary/Wages: \$\_\_\_\_\_

Other Income: \$\_\_\_\_\_

Total Income: \$\_\_\_\_\_

### Expenses

Housing (Rent/Mortgage): \$\_\_\_\_\_

Utilities: \$\_\_\_\_\_

Groceries: \$\_\_\_\_\_

Transportation: \$\_\_\_\_\_

Insurance: \$\_\_\_\_\_

Entertainment: \$\_\_\_\_\_

Savings: \$\_\_\_\_\_

Other: \$\_\_\_\_\_

Total Expenses: \$\_\_\_\_\_

**Net Income: \$\_\_\_\_\_**

## INVESTMENT TRACKER

Investment Account: \_\_\_\_\_

Current Value: \$\_\_\_\_\_

Monthly Contribution: \$\_\_\_\_\_

Target Goal: \$\_\_\_\_\_

## DEBT PAYOFF TRACKER

Debt Name: \_\_\_\_\_

Current Balance: \$\_\_\_\_\_

Interest Rate: \_\_\_\_\_ %

Monthly Payment: \$\_\_\_\_\_