

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: \$ _____