

Finance

T R A C K E R

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FINANCIAL GOAL SETTING

S

Specific

M

Measurable

A

Attainable

R

Relevant

T

Time-Bound

FINANCIAL GOAL PLANNER

ACTIVITY	DESIRED OUTCOMES
TASKS/ACTION STEPS	RESPONSIBILITIES
RESOURCES	TIMELINE

INCOME TRACKER

DATE	DESCRIPTION	AMOUNT	ACCOUNT

EXPENSE TRACKER

DATE	AMOUNT	CATEGORY	OUTGOING

NOTES	
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DEBT PAYMENT TRACKER

TYPE: _____

MIN.PAYMENT:

TOTAL PAYMENT:

PAID

BALANCE

PAID

BALANCE

MONTH 1

MONTH 13

MONTH 2

MONTH 14

MONTH 3

MONTH 15

MONTH 4

MONTH 16

MONTH 5

MONTH 17

MONTH 6

MONTH 18

MONTH 7

MONTH 19

MONTH 8

MONTH 20

MONTH 9

MONTH 21

MONTH 10

MONTH 22

MONTH 11

MONTH 23

MONTH 12

MONTH 24

SAVINGS TRACKER

GOAL: _____

START:	END:

DATE	MEMO	WITHDRAWAL	DEPOSIT	BALANCE

QUARTERLY BILL TRACKER

M	T	W	T	F	S	S	BILL	AMOUNT

REVIEW:
