



# FINANCIAL GOALS WORKSHEET

Date:

A. GIVING GOALS
WOULD YOU LIKE TO GIVE ____ PERCENTAGE OF YOUR INCOME
OTHER GIVING GOALS:

B. DEBT REPAYMENT GOALS		
WOULD YOU LIKE TO PAY OFF THE FOLLOWING DEBT FIRST:		
CREDITOR	AMOUNT	DATE
_____	_____	_____
_____	_____	_____
_____	_____	_____

C. LIFESTYLE GOALS		
WOULD LIKE TO MAKE THE FOLLOWING MAJOR PURCHASES		
ITEM	AMOUNT	DATE
_____	_____	_____
_____	_____	_____
_____	_____	_____

WOULD LIKE TO ACHIEVE THIS AS ANNUAL INCOME
TOTAL _____

# PERSONAL MONTHLY SPENDING PLAN

<b>MONTHLY INCOME</b>		<b>ENTERTAINMENT/ RECREATION</b>	
Income I bring home		Eating out	
Other income		Vacation	
<b>TOTAL INCOME</b>		Others/Activities	
Less Tithes and Offerings		<b>MEDICAL EXPENSES</b>	
Other Taxes		Doctor	
<b>HOUSING</b>		Medicine	
Mortgage (Rent)		<b>MONTHLY SAVINGS</b>	
Electricity		<b>MISCELLANEOUS</b>	
Gas LPG		Toiletries	
Water		Beauty/Barber	
Phone/Internet		Laundry/Cleaning	
Others/Maintenance/Repairs		Pet Supplies	
<b>FOOD MONTHLY TOTAL</b>		Subscriptions	
<b>TRANSPORTATION</b>		Other Expenses	
Monthly commute		<b>SCHOOL/CHILDCARE</b>	
Gas and oil change/Maintenance		Tuition	
Insurance		Books and Supplies	
Registration/Tax/Repairs		Transportation	
<b>INSURANCE</b>		<b>INCOME VS EXPENSES</b>	
Life Insurance		Net Spendable Income	
Medical Insurance		Less Total Expense	
<b>DEBT</b>		<b>MONTHLY SURPLUS OR DEFICIT</b>	
Credit Cards			
Other Loans			
<b>TOTAL</b>			