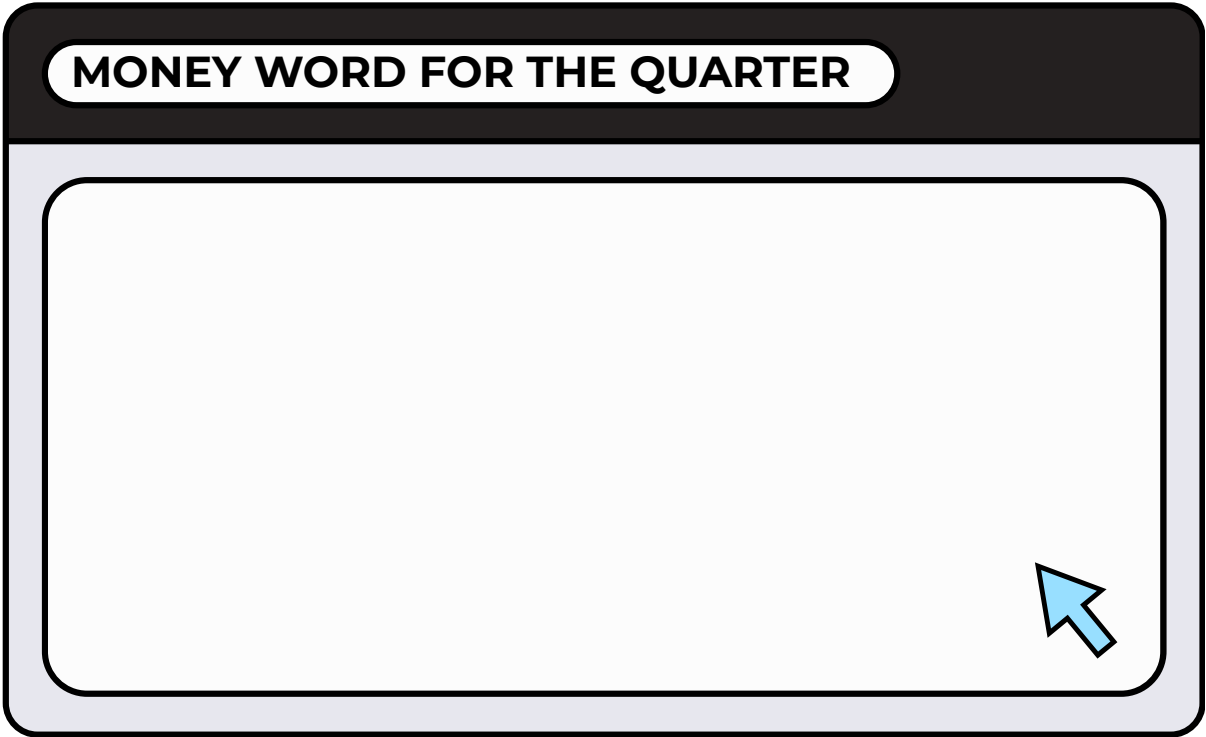


# 90-DAY FINANCIAL PLANNER

  
TITA RAKETERA

**MONEY WORD FOR THE QUARTER**



This planner belongs to:

**NAME**

.....

**ADDRESS**

.....

**EMAIL**

.....

**PHONE**

.....

**My Big Money Why**

What's the deeper reason I want to manage and grow my money?

**My Top 3 Money Dreams**

What are my top 3 financial goals?

**My Dream Income Streams**

What kinds of work, products, or services would I love to earn from?

**I'll Feel Abundant When...**

What does abundance look and feel like in my everyday life?

MY MONEY  
**VISION**  
*Board*

**What I'm Manifesting This Year**

What financial goals am I focused on this year?

**My Money Affirmation**

What is my money mantra to boost my financial mindset?

**My Relationship with Money**

How do I feel about money right now—scared, confident, curious?

**Actions to Align with My Goals**

What 2-3 actions will I take to reach my money goals?

Use words, drawings, or clippings that inspire your financial dreams.

## QUICK NOTE

Use this as a guide to set clear, realistic goals throughout the year. Don't overthink—just start!

# SMART GOALS

When setting goals, make sure it follows the SMART structure.

Use the questions below to create your goals.

S	<u>SPECIFIC</u>	WHAT DO I WANT TO ACCOMPLISH?
M	<u>MEASURABLE</u>	HOW WILL I KNOW WHEN IT IS ACCOMPLISHED?
A	<u>ACHIEVABLE</u>	HOW CAN THE GOAL BE ACCOMPLISHED?
R	<u>RELEVANT</u>	DOES THIS SEEM WORTHWHILE?
T	<u>TIME BOUND</u>	WHEN CAN I ACCOMPLISH THIS GOAL?

# FINANCIAL GOALS

List your top goals by category. Update status each month.

GOALS	TIMEFRAME	STATUS
<i>Emergency Fund ₱ 100,000</i>	<i>6 months</i>	<i>₱ 50,000 saved so far, BPI Savings Account</i>



INCOME

EXPENSES

SAVINGS

INVESTMENTS











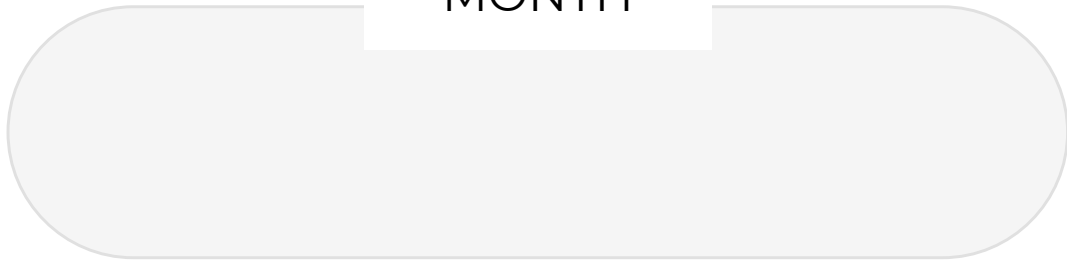








MONTH



**What money dream needs my focus?**

*Money grows where intention flows.*









# MONTHLY SUMMARY

**INCOME**

**EXPENSES**

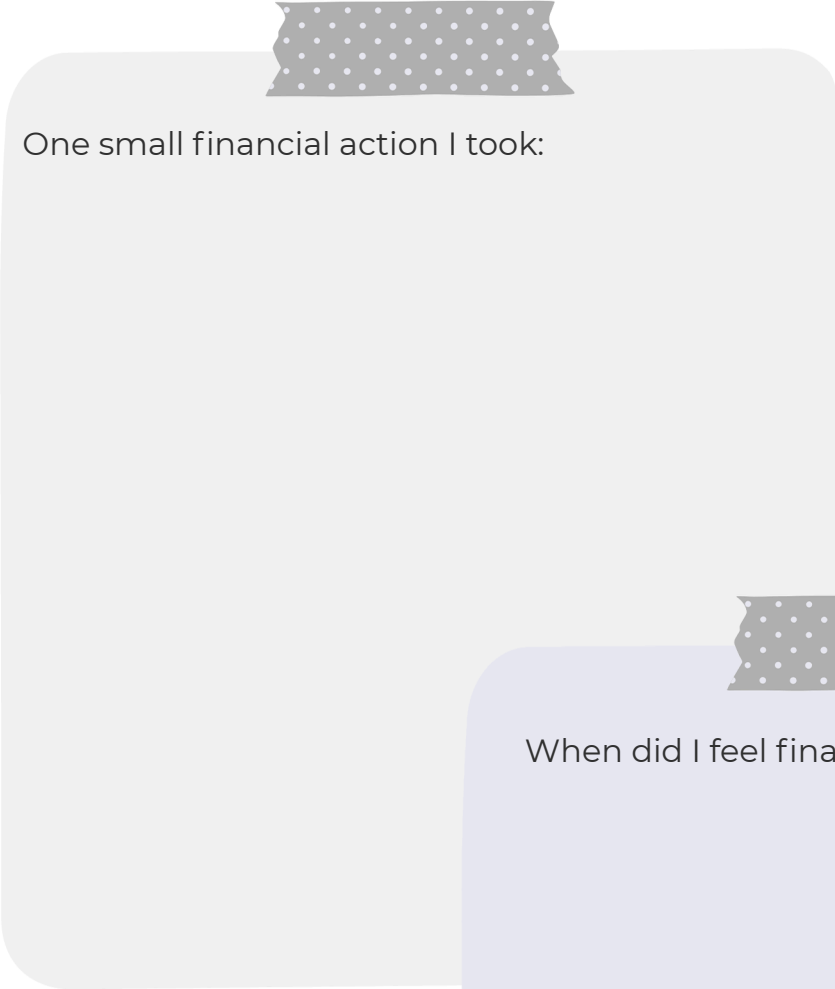
**SAVINGS**

**INVESTMENTS**

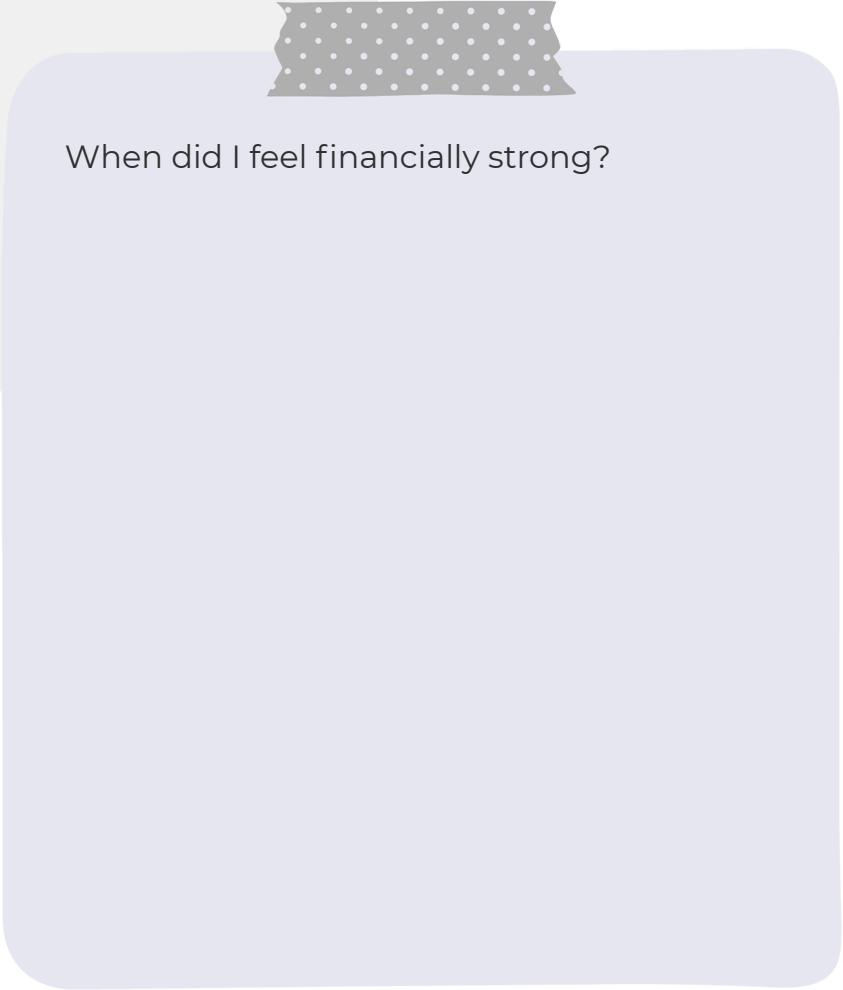


**NOTES/ACTION PLAN**

# HIGHLIGHTS



One small financial action I took:



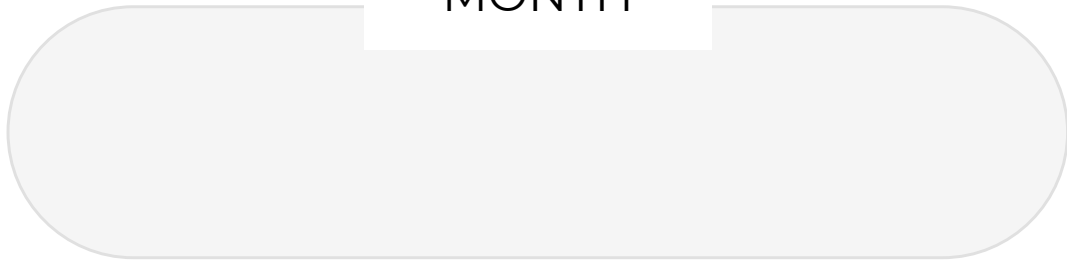
When did I feel financially strong?



*Awareness is the first step to abundance.*



MONTH



**What money habit will I strengthen?**

A large empty rounded rectangular box with a light gray border and a black outline, intended for writing an answer. A blue mouse cursor is visible in the bottom right corner.

*Progress is built one decision at a time.*









# MONTHLY SUMMARY

**INCOME**

Empty box for recording income.

**EXPENSES**

Empty box for recording expenses.

**SAVINGS**

Empty box for recording savings.

**INVESTMENTS**

Empty box for recording investments.




**NOTES/ACTION PLAN**

Large empty box for writing notes or an action plan.

# HIGHLIGHTS



Money habit I improved this month:



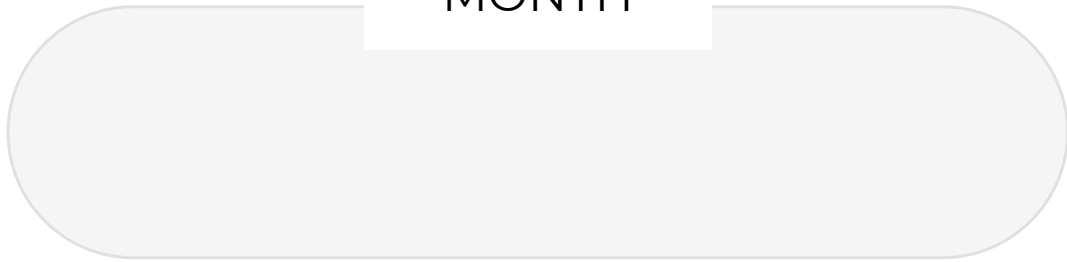
Unexpected money blessing I received:



*Consistency nurtures growth.*



MONTH



**What financial blessing can I grow?**

A large empty rounded rectangular box with a light gray border and a black outline, intended for writing an answer. A blue mouse cursor is visible in the bottom right corner.

*Gratitude multiplies what you have.*









# MONTHLY SUMMARY

**INCOME**

**EXPENSES**


**SAVINGS**

**INVESTMENTS**




**NOTES/ACTION PLAN**

# HIGHLIGHTS



Financial win I'm grateful for:



Action I'll continue next quarter:



*Gratitude anchors abundance.*

# QUARTERLY REVIEW

TOTAL INCOME

TOTAL EXPENSES

TOTAL SAVINGS

TOTAL INVESTMENTS

HIGHLIGHTS

LESSONS I LEARNED

WHAT WORKED

WHAT I'LL STOP DOING

IMPROVEMENTS TO MAKE

# QUARTERLY PREVIEW

MY FOCUS IS ON

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MILESTONES

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

I'M EXCITED FOR

---

---

---

I'M SCARED OF

---

---

---

DO

DON'T

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

MAIN GOALS

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

4 \_\_\_\_\_

5 \_\_\_\_\_

6 \_\_\_\_\_

7 \_\_\_\_\_

8 \_\_\_\_\_

IMPORTANT DATES

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