

Printable Financial Management Sheets

Track expenses, plan budgets, and **gain full control of your finances** with easy-to-use sheets!

THE
Biz
Sheets

\$1000 CHALLENGE

START DATE:

END DATE:

\$5	\$35	\$10	\$20	\$35
\$10	\$55	\$35	\$35	\$45
\$15	\$45	\$15	\$45	\$35
\$25	\$55	\$25	\$25	\$55
\$30	\$25	\$35	\$55	\$45
\$35	\$45	\$20	\$45	\$25

50-20-30 PLAN TEMPLATE

INCOME		
DATE	SOURCE	AMOUNT

NEEDS(50%)	BUDGET	ACTUAL
TOTAL		

SAVINGS/DEBT(20%)	BUDGET	ACTUAL
TOTAL		

WANTS(30%)	BUDGET	ACTUAL
TOTAL		

NEEDS (50% OF INCOME)	
WANTS (30% OF INCOME)	
SAVINGS (20% OF INCOME)	

SUMMARY	BUDGET	ACTUAL
TOTAL INCOME		
TOTAL NEEDS		
TOTAL SAVINGS		
TOTAL WANTS		

NOTES

70/20/10 RULE TEMPLATE

YEAR

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

INCOME	
INCOME	
NEEDS (70%)	
WANTS (20%)	
SAVINGS (10%)	

ACTUAL	
TOTAL SPEND	
TOTAL NEED	
TOTAL WANTS	
TOTAL SAVINGS	

DIFFERENCE	
INCOME VS SPEND	
NEEDS	
WANTS	
SAVINGS	

[illegible][illegible][illegible]

BI-WEEKLY BUDGET

INCOME	PLANNED	ACTUAL

TOTAL: _____

BILLS	BUDGET	ACTUAL

TOTAL: _____

DEBT	BUDGET	ACTUAL

TOTAL: _____

EXPENSES	BUDGET	ACTUAL

TOTAL: _____

SAVINGS	BUDGET	ACTUAL

TOTAL: _____

SUMMARY	BUDGET	ACTUAL
TOTAL INCOME		
TOTAL BILLS		
TOTAL SAVINGS		
TOTAL EXPENSES		
TOTAL DEBT		

TOTAL: _____

SAVINGS JAR TRACKER

SAVINGS FOR:

GOAL AMOUNT:

STARTING BALANCE:

[illegible]

NOTES

TAX DEDUCTION SHEET

[illegible]

26 WEEK SAVINGS CHALLENGE

Start Date:		Savings For:	
End Date:		Total Saved:	

Week	Amount	Total	Week	Amount	Total
1			14		
2			15		
3			16		
4			17		
5			18		
6			19		
7			20		
8			21		
9			22		
10			23		
11			24		
12			25		
13			26		



52 WEEK SAVINGS CHALLENGE

GOAL:		DATE:	
SAVINGS FOR:		TOTAL SAVED:	

Week	Deposit	Balance	Week	Deposit	Balance
1			27		
2			28		
3			29		
4			30		
5			31		
6			32		
7			33		
8			34		
9			35		
10			36		
11			37		
12			38		
13			39		
14			40		
15			41		
16			42		
17			43		
18			44		
19			45		
20			46		
21			47		
22			48		
23			49		
24			50		
25			51		
26			52		

AFTERPAY TEMPLATE

SHOP:	
TOTAL:	
AMOUNT DUE:	
INSTALMENTS:	
☐	
☐	
☐	
☐	

SHOP:	
TOTAL:	
AMOUNT DUE:	
INSTALMENTS:	
☐	
☐	
☐	
☐	

SHOP:	
TOTAL:	
AMOUNT DUE:	
INSTALMENTS:	
☐	
☐	
☐	
☐	

SHOP:	
TOTAL:	
AMOUNT DUE:	
INSTALMENTS:	
☐	
☐	
☐	
☐	

SHOP:	
TOTAL:	
AMOUNT DUE:	
INSTALMENTS:	
☐	
☐	
☐	
☐	

SHOP:	
TOTAL:	
AMOUNT DUE:	
INSTALMENTS:	
☐	
☐	
☐	
☐	

ANNUAL FINANCE TEMPLATE

YEAR: _____

FINANCIAL GOALS

ACTION STEPS

MONTHS	INCOME		EXPENSES		PROFIT	
	Goal	Actual	Goal	Actual	Goal	Actual
JAN						
FEB						
MAR						
APR						
MAY						
JUN						
JUL						
AUG						
SEP						
OCT						
NOV						
DEC						
WHOLE YEAR OVERVIEW						
TARGET INCOME			DIFFERENCE	TARGET INCOME		
TARGET EXPENSE				TARGET EXPENSE		

CREDIT CARD TEMPLATE

CARD NAME:	
CARD TYPE:	BANK NAME:
CARD NO.:	PHONE:
EXP DATE:CVV:	WEBSITE:
PIN:	USERNAME:
CREDIT LIMIT:	PASSWORD:

CARD NAME:	
CARD TYPE:	BANK NAME:
CARD NO.:	PHONE:
EXP DATE:CVV:	WEBSITE:
PIN:	USERNAME:
CREDIT LIMIT:	PASSWORD:

CARD NAME:	
CARD TYPE:	BANK NAME:
CARD NO.:	PHONE:
EXP DATE:CVV:	WEBSITE:
PIN:	USERNAME:
CREDIT LIMIT:	PASSWORD:

CARD NAME:	
CARD TYPE:	BANK NAME:
CARD NO.:	PHONE:
EXP DATE:CVV:	WEBSITE:
PIN:	USERNAME:
CREDIT LIMIT:	PASSWORD:

DEBT SNOWBALL TRACKER

		DEBT 1	DEBT 2	DEBT 3	DEBT 4
DEBT NAME					
STARTING BALANCE					
MINIMUM PAYMENT					
JAN	PAYMENT				
	BALANCE				
FEB	PAYMENT				
	BALANCE				
MAR	PAYMENT				
	BALANCE				
APR	PAYMENT				
	BALANCE				
MAY	PAYMENT				
	BALANCE				
JUN	PAYMENT				
	BALANCE				
JUL	PAYMENT				
	BALANCE				
AUG	PAYMENT				
	BALANCE				
SEP	PAYMENT				
	BALANCE				
OCT	PAYMENT				
	BALANCE				
NOV	PAYMENT				
	BALANCE				
DEC	PAYMENT				
	BALANCE				



DEBT TRACKER

CREDITOR:
MINIMUM PAYMENT:
GOAL MONTHLY REPAYMENT:
GOAL PAYOFF DATE:

[illegible]

PROGRESS TRACKER:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
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DONATION TRACKER

[illegible]

EMERGENCY FUND TEMPLATE

AMOUNT NEEDED:		TARGET DATE:	
MONTHLY SAVINGS TARGET:		ACCOUNT NO.:	

[illegible]

NOTES

EXPENSES TRACKER

[illegible]

FINANCIAL GOAL TRACKER

GOAL:						\$					☐
START DATE:				DEADLINE:							
PROGRESS TRACKER:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	

GOAL:						\$					☐
START DATE:				DEADLINE:							
PROGRESS TRACKER:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	

GOAL:						\$					☐
START DATE:				DEADLINE:							
PROGRESS TRACKER:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	

GOAL:						\$					☐
START DATE:				DEADLINE:							
PROGRESS TRACKER:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	

GOAL:						\$					☐
START DATE:				DEADLINE:							
PROGRESS TRACKER:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	

GOAL:						\$					☐
START DATE:				DEADLINE:							
PROGRESS TRACKER:	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	

INCOME TRACKER

[illegible]

FINANCIAL NOTES



INVESTMENT TRACKER

[illegible]

MEDICAL EXPENSES

[illegible]

MONTHLY BUDGET PLANNER

INCOME	PLANNED	ACTUAL
TOTAL:		

EXPENSES	BUDGET	ACTUAL
TOTAL:		

BILLS	BUDGET	ACTUAL
TOTAL:		

SAVINGS	BUDGET	ACTUAL
TOTAL:		

DEBT	BUDGET	ACTUAL
TOTAL:		

SUMMARY	BUDGET	ACTUAL
TOTAL INCOME		
TOTAL BILLS		
TOTAL SAVINGS		
TOTAL EXPENSES		
TOTAL DEBT		
TOTAL:		

NO SPEND TEMPLATE

START DATE:	END DATE:	SAVING FOR:
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1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	<i>Congrats! You made it!</i>			

REASON, WHY?	NO BUY LIST	EXCEPTIONS

NO SPEND DAYS:	SPEND DAYS:	END AMOUNT:
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ANNUAL NO SPEND DAYS

JAN 1234567 891011121314 15161718192021 22232425262728 293031	FEB 1234567 891011121314 15161718192021 22232425262728 29	MAR 1234567 891011121314 15161718192021 22232425262728 293031
APR 1234567 891011121314 15161718192021 22232425262728 2930	MAY 1234567 891011121314 15161718192021 22232425262728 293031	JUN 1234567 891011121314 15161718192021 22232425262728 2930
JUL 1234567 891011121314 15161718192021 22232425262728 293031	AVG 1234567 891011121314 15161718192021 22232425262728 293031	SEP 1234567 891011121314 15161718192021 22232425262728 2930
OCT 1234567 891011121314 15161718192021 22232425262728 293031	NOV 1234567 891011121314 15161718192021 22232425262728 2930	DEC 1234567 891011121314 15161718192021 22232425262728 293031

ONLINE PURCHASES

DATE	STORE	ITEM	COST	SHP	RCV
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					
					

QUARTER BUDGET 1 & 2

YEAR: _____

Quarter 1 Budget

TOTAL INCOME	TOTAL EXPENSE	DIFFERENCE

START OF THE QUARTER

END OF THE QUARTER

BALANCE		
SAVINGS		
DEBT		

MONTH	INCOME	EXPENSE	DIFFERENCE	DEBT PAID	SAVINGS
JANUARY					
FEBRUARY					
MARCH					
TOTAL					

Quarter 2 Budget

TOTAL INCOME	TOTAL EXPENSE	DIFFERENCE

START OF THE QUARTER

END OF THE QUARTER

BALANCE		
SAVINGS		
DEBT		

MONTH	INCOME	EXPENSE	DIFFERENCE	DEBT PAID	SAVINGS
APRIL					
MAY					
JUNE					
TOTAL					

QUARTER BUDGET 3 & 4

YEAR: _____

Quarter 3 Budget

TOTAL INCOME	TOTAL EXPENSE	DIFFERENCE

	START OF THE QUARTER	END OF THE QUARTER
BALANCE		
SAVINGS		
DEBT		

MONTH	INCOME	EXPENSE	DIFFERENCE	DEBT PAID	SAVINGS
JULY					
AUGUST					
SEPTEMBER					
TOTAL					

Quarter 4 Budget

TOTAL INCOME	TOTAL EXPENSE	DIFFERENCE

	START OF THE QUARTER	END OF THE QUARTER
BALANCE		
SAVINGS		
DEBT		

MONTH	INCOME	EXPENSE	DIFFERENCE	DEBT PAID	SAVINGS
OCTOBER					
NOVEMBER					
DECEMBER					
TOTAL					

RETIREMENT FUNDS

Initial Balance:		Bank:	
Account Number:			

[illegible]

SINKING FUNDS TRACKER

FUND:			
GOAL:		DUE DATE:	

DATE	AMOUNT	BALANCE

FUND:			
GOAL:		DUE DATE:	

DATE	AMOUNT	BALANCE

FUND:			
GOAL:		DUE DATE:	

DATE	AMOUNT	BALANCE

FUND:			
GOAL:		DUE DATE:	

DATE	AMOUNT	BALANCE

SPENDING TRACKER

MONTH:

[illegible]

UPCOMING EXPENSES TRACKER

JAN	FEB	MAR
APR	MAY	JUN
JUL	AVG	SEP
OCT	NOV	DEC

VACATION BUDGET PLANNER

DESTINATION:		TOTAL BUDGET:	
DATE:		TOTAL ACTUAL:	

TRANSPORT	BUDGET	ACTUAL

TOTAL: _____

ACCOMMODATION	BUDGET	ACTUAL

TOTAL: _____

FOOD & DRINKS	BUDGET	ACTUAL

TOTAL: _____

ENTERTAINMENT	BUDGET	ACTUAL

TOTAL: _____

ACTIVITIES	BUDGET	ACTUAL

TOTAL: _____

OTHERS	BUDGET	ACTUAL

TOTAL: _____

FINANCE WISHLIST

CATEGORY:

ITEM	STORE	PRICE	NOTES
			
			
			
			
			
			

CATEGORY:

ITEM	STORE	PRICE	NOTES
			
			
			
			
			
			

CATEGORY:

ITEM	STORE	PRICE	NOTES
			
			
			
			
			
			

