



FINANCIAL PLANNER

LIBERTY FINANCIAL SERVICES

Gain Knowledge. Gain Freedom.



Budget Checklist

- Rent/Mortgage statement
- Utilities
- Credit Card Statement(s)
- Recurring Bills (Hulu,Netflix)
- Annual Bills (Amazon Prime)
- Student loan statement(s)
- Car Payment
- Car Insurance
- Child Care
- Pet supplies/Vet visits
- Savings
- Retirement
-

FINANCIAL GOALS

Short-term Goal

Brainstorm ways you can reach the goal:

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____

Milestones:

Due on:

To-do:

1.	_____	<input type="radio"/>	_____	<input type="radio"/>
2.	_____	<input type="radio"/>	_____	<input type="radio"/>
3.	_____	<input type="radio"/>	_____	<input type="radio"/>
4.	_____	<input type="radio"/>	_____	<input type="radio"/>
5.	_____	<input type="radio"/>	_____	<input type="radio"/>

Long-term Goals

Brainstorm ways you can reach the goal:

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____

Milestones:

Due on:

To-do:

1.	_____	<input type="radio"/>	_____	<input type="radio"/>
2.	_____	<input type="radio"/>	_____	<input type="radio"/>
3.	_____	<input type="radio"/>	_____	<input type="radio"/>
4.	_____	<input type="radio"/>	_____	<input type="radio"/>
5.	_____	<input type="radio"/>	_____	<input type="radio"/>

SUBSCRIPTION LIST

Company Name: _____

Due Date: _____

Monthly Payment: _____

Renewal Date: _____

Company Name: _____

Due Date: _____

Monthly Payment: _____

Renewal Date: _____

Company Name: _____

Due Date: _____

Monthly Payment: _____

Renewal Date: _____

Company Name: _____

Due Date: _____

Monthly Payment: _____

Renewal Date: _____

Company Name: _____

Due Date: _____

Monthly Payment: _____

Renewal Date: _____

Company Name: _____

Due Date: _____

Monthly Payment: _____

Renewal Date: _____

Company Name: _____

Due Date: _____

Monthly Payment: _____

Renewal Date: _____

Company Name: _____

Due Date: _____

Monthly Payment: _____

Renewal Date: _____

EXPENSE TRACKER

Category:	
Expense	Amount

Category:	
Expense	Amount

Category:	
Expense	Amount

Category:	
Expense	Amount

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Expense	Amount

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EXPENSE TRACKER

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EXPENSE TRACKER

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Expense	Amount

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Category:	
Expense	Amount

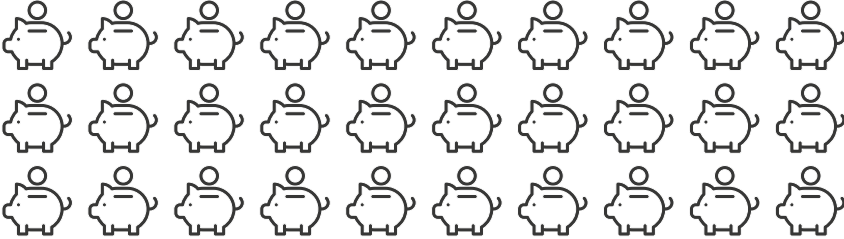
Category:	
Expense	Amount

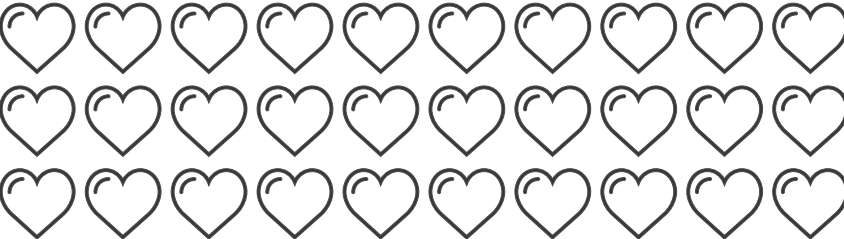
Category:	
Expense	Amount

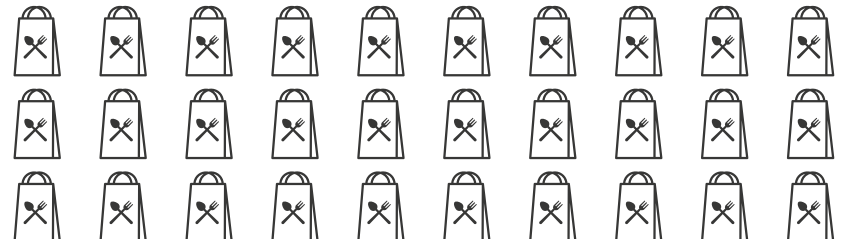
Category:	
Expense	Amount


FINANCIAL HABIT TRACKER

Habit:	Notes:
	

Habit:	Notes:
	

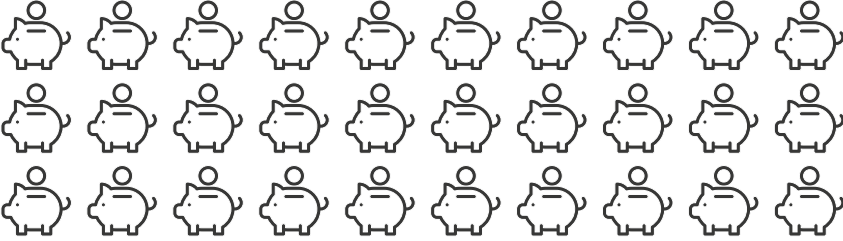
Habit:	Notes:
	

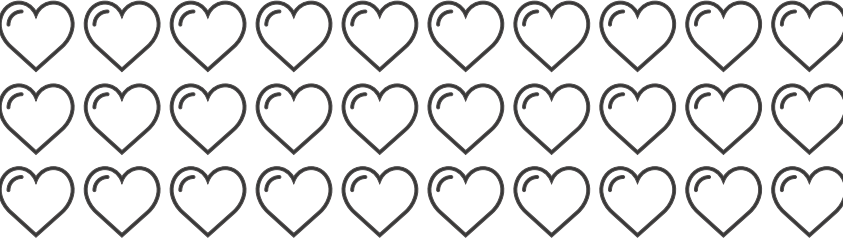
Habit:	Notes:
	

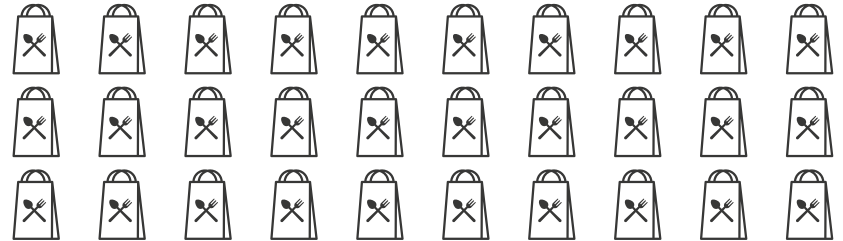
Habit:	Notes:
	


FINANCIAL HABIT TRACKER

Habit:	Notes:
	

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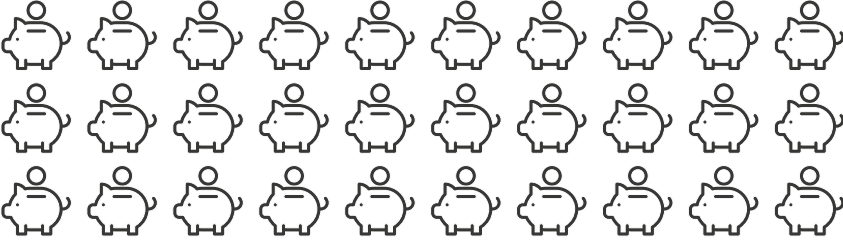
Habit:	Notes:
	

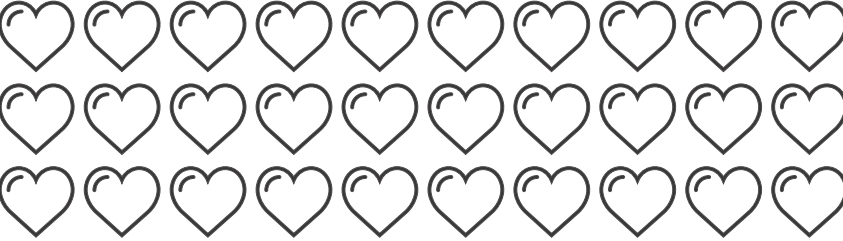
Habit:	Notes:
	

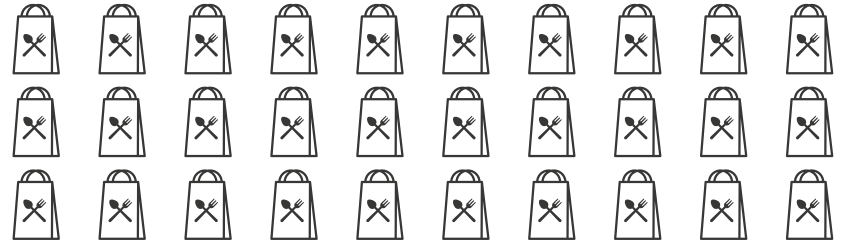
Habit:	Notes:
	


FINANCIAL HABIT TRACKER

Habit:	Notes:
	

Habit:	Notes:
	

Habit:	Notes:
	

Habit:	Notes:
	

Habit:	Notes:
	

SAVINGS TRACKER

My Goal:

My Motivation:



100 %

90 %

80 %

70 %

60 %

50 %

40 %

30 %

20 %

10 %

0 %

SAVINGS TRACKER

My Goal:

My Motivation:



100 %

90 %

80 %

70 %

60 %

50 %

40 %

30 %

20 %

10 %

0 %

DEBT SNOWBALL SHEET

	Debt:	Debt:	Debt:	Debt:	Debt:	Debt:	Debt:
Start Balance							
Payment							
New Balance							
Payment							
New Balance							
Payment							
New Balance							
Payment							
New Balance							
Payment							
New Balance							
Payment							
New balance							
Payment							
New balance							
Payment							
New balance							
Payment							
New balance							

DEBT PAYOFF TRACKER

My Motivation:

My debt:

