

Prepared by United Wealth Solutions

Leveraging Funding. Supporting Small Business.

Monthly Budget & Financial Goals Tracker — Page 1: Budget Overview

Month/Year:

Total Monthly Income

Income Source 1:

Income Source 2:

Income Source 3:

Total Income:

Savings Overview

Savings Account 1:

Savings Account 2:

Savings Account 3:

Total Savings:

Actual Expenses

Housing:

Food & Groceries:

Transportation:

Utilities:

Healthcare:

Debt:

Entertainment:

Miscellaneous:

Total Expenses:

Financial Snapshot Summary

Monthly Surplus/Deficit:

Savings Rate (%):

Debt-to-Income Ratio (%):

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Monthly Budget & Financial Goals Tracker — Page 2: Goals & Reflection

Monthly Financial Goals

Goal 1:

Goal 2:

Goal 3:

Top 5 Overspending Categories

Top 3 Areas to Cut Costs

Business Budget Add-On (Optional)

Business Income:

Business Expenses:

Net Profit/Loss:

“Financial discipline builds freedom. Every dollar and minute you manage moves you closer to your goal.”