Personal Story
AND THE
WHY

WHAT IS YOUR **WHY**?

WHAT IS YOUR PERSONAL STORY?

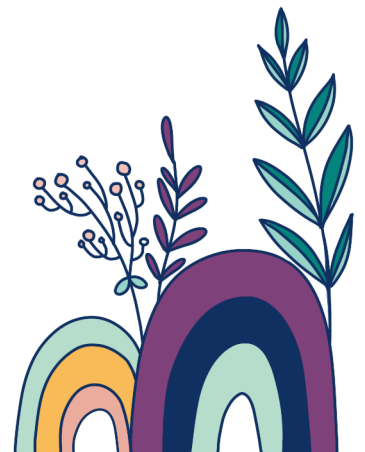# Variable Expenses

CATEGORY	AMOUNT
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

NOTES

Bills & Fixed Expenses

DATE	DESCRIPTION	AMOUNT

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Savings Goals

IMPORTANCE	DESCRIPTION	ALREADY SAVED	GOAL AMOUNT	TIME HORIZON

GOAL DATE	DESCRIPTION	YEARLY AMOUNT	ALREADY SAVED	MONTHLY AMOUNT	MONTHS TO SAVE

Debt Picture

DEBT PRIORITY	DESCRIPTION	STARTING BALANCE	INTEREST RATE	MINIMUM PAYMENTS	DUE DATE

Income & Pay Schedule

TOTAL MONTHLY INCOME: _____

PAY SCHEDULE: _____
(WEEKLY/BI-WEEKLY/MONTHLY)

LIST YOUR INCOME DOWN BELOW FOR THIS MONTH AND NEXT MONTH:

PAY DATE	SOURCE/DESCRIPTION	AMOUNT

OTHER SOURCES OF INCOME

PAY DATE	SOURCE/DESCRIPTION	AMOUNT