# FAMILY FINANCIAL PLANNING

## FINANCIAL GOALS

GOALS HELP YOU AND YOUR FAMILY TO STICK ON BUDGET AND BE DISCIPLINE WITH TARGET GOALS AND KEEP YOU ON TRACK WITH

## SHORT TERM

- 1.
- 2.
- 3.
- 4.

### MEDIUM TERM

- 1.
- 2.
- 3.
- 4.

## LONG TERM

- 1.
- 2.
- 3.
- 4.

Husband Responsibilities
Wife Responsibilities

# Annual Budget

List top annual budget expenses

Budget Travelling
Budget Investment
Budget Investment
Budget Hari Spesial

## SAVINGS TRACKER

#### **INVESTMENT GOALS**

AMOUNT NEEDED

1.			
2.			
3			

MONTH	SAVINGS	DEPOSITO	INEVSTASI	INVESTASI	TOTAL
JANUARY					
FEBRUARY					
MARCH					
APRIL					
MAY					
JUNE					
JULY					
AUGUST					
SEPTEMBER					
OCTOBER					
NOVEMBER					
DECEMBER					

# FINANCE Planner

ı			NI	т	ш
ı	v	ı	IN		п

INITIAL B	BALANCE		ENDING E	BALANCE	
EXPENS	SES		EXPENSES		
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT
	Т	OTAL			TOTAL
IMMARY					
тот	TAL INCOME	TOTAL EXF	PENSES	ENDING BALA	NCE
OTES					

# FINANCES

## **EXPENSES**

## FIXED COST

DATE	ITE	M	COST	DATE	ITEM	COST
	TN I		,			
		COME			NSES TOTAL	
DATE	SOURCE	AMOUN	Γ BALANCE		O TOTAL	
				INCO.	ME TOTAL	
				CLOS	SING BALANCE	

SES
DESCRIPTION AMOUN
TOTAL
ENDING BALANCE

SES
DESCRIPTION AMOUN
TOTAL
ENDING BALANCE

INITIAL	BALANCE		ENDING E	BALANCE		
EXPEN	ISES		EXPENSES			
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT	
	TC	DTAL	•	-	TOTAL	
SUMMAR	Υ					
TOTAL INCOME TOTAL EXP		PENSES ENDING BALANCE		NCE		
NOTES						

INITIAL	BALANCE		ENDING E	BALANCE		
EXPEN	ISES		EXPENSES			
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT	
	TC	DTAL	•	-	TOTAL	
SUMMAR	Υ					
TOTAL INCOME TOTAL EXP		PENSES ENDING BALANCE		NCE		
NOTES						

EXPENSES		
DESCRIPTION AMOUN		
TOTAL		
ENDING BALANCE		

## FINANCE Planner MONTH Planner YEAR

INITIAL BALANCE			ENDING	BALANCE		
EXPEN	EXPENSES			EXPENSES		
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT	
	T	OTAL			TOTAL	
SUMMARY	Y					
тс	TAL INCOME	TOTAL EX	PENSES	ENDING BALA	ANCE	
NOTES						

INITIAL BALANCE	 ENDING BALANCE	

MONTH

**EXPENSES** 

DATE	DESCRIPTION	AMOUNT
	ТОТА	L

DATE	DESCRIPTION	AMOUNT				
	TOTAL					

#### SUMMARY

**EXPENSES** 

TOTAL INCOME	TOTAL EXPENSES	ENDING BALANCE

NOTES			

## FINANCE Planner MONTH Planner YEAR

INITIAL BALANCE			ENDING	BALANCE		
EXPEN	SES		EXPENSE	EXPENSES		
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT	
	T	OTAL			TOTAL	
SUMMARY	Y					
тс	TAL INCOME	TOTAL EX	PENSES	ENSES ENDING BALANCE		
NOTES						

INITIAL BALANCE		ENDING BALANCE			
EXPEN	ISES		EXPENSES		
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT
	TC	DTAL	•	-	TOTAL
SUMMAR	Υ				
TOTAL INCOME TOTAL EXP		PENSES ENDING BALANCE		NCE	
NOTES					

INITIAL BALANCE		ENDING BALANCE			
EXPEN	ISES		EXPENSES		
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT
	TC	DTAL	•	-	TOTAL
SUMMAR	Υ				
TOTAL INCOME TOTAL EXP		PENSES ENDING BALANCE		NCE	
NOTES					

INITIAL BALANCE		ENDING BALANCE			
EXPEN	ISES		EXPENSES		
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT
	TC	DTAL	•	-	TOTAL
SUMMAR	Υ				
TOTAL INCOME TOTAL EXP		PENSES ENDING BALANCE		NCE	
NOTES					

INITIAL BALANCE		ENDING BALANCE			
EXPEN	ISES		EXPENSES		
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT
	TC	DTAL	•	-	TOTAL
SUMMAR	Υ				
TOTAL INCOME TOTAL EXP		PENSES ENDING BALANCE		NCE	
NOTES					

INITIAL BALANCE		ENDING BALANCE			
EXPEN	ISES		EXPENSES		
DATE	DESCRIPTION	AMOUNT	DATE	DESCRIPTION	AMOUNT
	TC	DTAL	•	-	TOTAL
SUMMAR	Υ				
TOTAL INCOME TOTAL EXP		PENSES ENDING BALANCE		NCE	
NOTES					

INITIAL	BALANCE		ENI	DING E	BALANCE	
EXPEN	ISES		EXPE	NSES		
DATE	DESCRIPTION	AMOUNT	DA	TE	DESCRIPTION	AMOUNT
	ТО	TAL				TOTAL
SUMMAR	Υ					
Т	OTAL INCOME	TOTAL EXP	ENSES		ENDING BALA	NCE
NOTES						

INITIAL	BALANCE		ENI	DING E	BALANCE	
EXPEN	ISES		EXPE	NSES		
DATE	DESCRIPTION	AMOUNT	DA	TE	DESCRIPTION	AMOUNT
	ТО	TAL				TOTAL
SUMMAR	Υ					
Т	OTAL INCOME	TOTAL EXP	ENSES		ENDING BALA	NCE
NOTES						

# Insurance List

ASURANSI NO POLIS	&	
ASURANSI NO POLIS	&	

# Investment Portofolio

Total Portofolio	)
Tabungan	
Deposito	
Obligasi	
Reksadana	
Saham	
Properti	
Crypto	
Business	
Lainnya	

## Financial Habits to Improve

Husband Signature	

# Financial Goals Tracker

J A N	F E B	M A R C H	APRIL	MAY	J U N E
	$\Box$				
	A 11 C	CEDT	0.01	NOV	DEC
JULY	A U G	SEPT	ОСТ	NOV	DEC
JULY	A U G	SEPT	OCT	NOV	DEC
JULY	AUG	SEPT	OCT	NOV	DEC
JULY	A U G	SEPT	OCT	NOV	DEC

# Your dream life is calling

Whatever your financial decision today, will define your financial's future