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Savings Tracking



Stepping Stones to Personal Finance Success

The Ultimate Personal Finance Organizer

Set your path to financial security & beyond

Checklist to Financial Independence

If you have any form of financial goal - such as getting your financial future secure, retirement, etc.

This helps

Keep track of your goals, track your progress, and see what you need to do to reach your goals.

Use it to track what you need to do to reach your goals.

Monthly Expense Tracking

The very first step to organizing your finances is to track your expenses. This helps you see where your money is going and where you need to cut back.

To track your expenses, you need to create a budget. This helps you see where your money is going and where you need to cut back.

Reference: [Expense Tracking](#)
Reference: [Expense Tracking](#)
Reference: [Expense Tracking](#)

Checklist to Financial Independence

If you have any form of financial goal - such as getting your financial future secure, retirement, etc.

This is the freedom of no longer feeling tied to a job.

Regardless of where you want to retire, financial independence is what you need to reach that goal. Once you reach this level of income, you only work because you have to.

Use this list to review your financial independence goals and see what you need to do to reach them.

Monthly Budget Worksheet

Once you have tracked your finances and have an understanding of the income coming in and spending going out, it's time to create a budget.

This is where you will review all expense categories and see where you need to cut back.

Welcome!

The best way to use this organizer is to:

1. Print as many pages as you like, or use a pdf editing tool to fill in forms electronically. (If you're using a printer, you'll need to print all pages in a single print and paper kinds permit this too.)
2. Look over the table of contents.
3. See where you are in your personal finance journey and which worksheets/checklists/forms are most beneficial for you. Personal finance is personal, you may need to go one by one in order, or you may need to skip around and find what works best for you.
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Collection Personal Finance Success

PT Brinkman



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