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Savings Tracking Worksheet



Stepping Stones to Personal Finance Success

The Ultimate Personal
Finance Organizer

Set your path to financial
security & beyond

Stephanie Moore LLC

Checklist to Financial Independence

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

This

helps

you

Monthly Expense Tracking

The very first step to organizing your finances is to track your expenses. This is where you will review all expense categories and determine how much you are spending on each.

To track your expenses, you need to create a budget. This is where you will review all expense categories and determine how much you are spending on each.

Reference: 100%
Expense Tracking
Reference: 100%
Expense Tracking

Checklist Index

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 focus on the way.

Use this list to review your financial independence what areas to focus on the way.

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 determine how much you are spending on each.

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. (I'll provide for placing all pages in a binder in case you are a print and paper kinda person like me.)
2. Look over the table of contents.
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Collection Personal Finance Success

Maria Eduarda KSB



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