



My budget planner

Understand your start position and use this live document to work out your spending, plan for your goals and feel more in control of your finances.

Make money work for you



My budget planner

What you might need to complete this:

- Bank statements
- Payslips
- Calculator

Type of income <small>(e.g. salary, benefits etc.)</small>		Amount (£)	Frequency
Incoming payments	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Monthly total (£)		<input type="text"/>

Essential payments	What it's for <small>(e.g. utilities, food shop, council tax, debt payments etc.)</small>	Amount (£)	Frequency <small>(Daily, weekly, monthly, annually)</small>	Type of payment <small>(Direct debit / STO / manual payment or subscription)</small>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly total (£)		<input type="text"/>		

Lifestyle payments	What it's for <small>(e.g. utilities, food shop, council tax, debt payments etc.)</small>	Amount (£)	Frequency <small>(Daily, weekly, monthly, annually)</small>	Type of payment <small>(Direct debit / STO / manual payment or subscription)</small>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly total (£)		<input type="text"/>		

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Lifestyle payments	What it's for	Amount (£)	Frequency	Type of payment
	<small>(e.g. utilities, food shop, council tax, debt payments etc.)</small>		<small>(Daily, weekly, monthly, annually)</small>	<small>(Direct debit / STO / manual payment or subscription)</small>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly total (£)		<input type="text"/>		

Savings and investments	What it's for	Amount (£)	Frequency	Type of payment
	<small>(e.g. utilities, food shop, council tax, debt payments etc.)</small>		<small>(Daily, weekly, monthly, annually)</small>	<small>(Direct debit / STO / manual payment or subscription)</small>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Monthly total (£)		<input type="text"/>		

Aspirations	Goals	Amount needed (£)	Target date
	<small>(e.g. new car, holiday etc.)</small>		<small>(ddmmyy)</small>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Totals (£)	
Incoming payments	<input type="text"/>
Essential payments	<input type="text"/>
Lifestyle payments	<input type="text"/>
Savings and investments	<input type="text"/>
Total outgoings	<input type="text"/>
Left to spend (+ / -)	<input type="text"/>

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Notes

Actions