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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

Checklist to Financial Independence

If you have any form of financial goal - such as getting your financial future secure, retirement, or more - this is the first step to achieving it.

This is the first step to achieving it.

Regardless of where you want to go, this is the first step to achieving it.

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

Monthly Expense Tracking

The very first step to organizing your finances is to track your expenses. This is the first step to achieving it.

To track your expenses, you need to know what you are spending money on. This is the first step to achieving it.

Reference: 1000
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Checklist Index

If you have any form of financial goal - such as getting your financial future secure, retirement, or more - this is the first step to achieving it.

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Regardless of where you want to go, this is the first step to achieving it.

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 adjust your budget accordingly. This is the first step to achieving it.

Welcome!

The best way to use this organizer is to:

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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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5. Take a look at the bottom of each intro page. If there is a corresponding blog post that will help clarify or provide a more in-depth understanding of the concept, you will find both a link you can click on and the written text so you can easily learn more.

Step By Step Personal Finance Success

Tony Raygoza



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