



Monthly Financial Planner

Month: _____ Year: _____

Monthly Vision & Faith Alignment

1. Prayer & Intention Setting

Scripture or Affirmation for the Month:

2. Coaching Focus for the Month

Top 1-3 financial priorities:

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•	
•	

Income Overview

3. Income

Source	Expected	Actual
Primary income		
Side income		
Other		
Total Income		

Coaching Prompt: How am I stewarding my income wisely?

Fixed Expenses (Needs)

4. Fixed Expenses

Category	Budgeted	Actual
Housing		
Utilities		
Transportation		

Created by: Jefferson County Treasurer, Angela Webb-Weinberg



Insurance		
Childcare		
Debt payments		
Total Fixed		

Faith Reflection: Are my needs aligned with peace and provision?

Variable Expenses (Wants)

5. Variable Expenses

Category	Budgeted	Actual
Groceries		
Dining		
Entertainment		
Personal		
Miscellaneous		
Total Variable		

Coaching Prompt: Where can I choose intention over impulse?

Savings, Giving & Investing

6. Savings & Giving

Goal	Budgeted	Actual
Emergency fund		
Retirement		
Sinking funds		
Giving / Tithes		
Other goals		
Total Saved / Given		

Faith Prompt: How does generosity show up in my financial plan?



Debt Tracker

7. Debt Paydown

Creditor	Balance	Min. Payment	Extra	New Balance

Coaching Prompt: What step moves me closer to freedom?

Weekly Check-Ins

8. Weekly Reflections

Week 1 — Wins / Lessons / Prayer Requests:

Week 2 — Wins / Lessons / Prayer Requests:

Week 3 — Wins / Lessons / Prayer Requests:

Week 4 — Wins / Lessons / Prayer Requests:

End-of-Month Review & Gratitude

9. Monthly Review

- What worked:
- What didn't:
- Biggest lesson learned:
- One faithful step I took:

10. Gratitude & Prayer

What am I thankful for in my financial journey this month?

Closing Prayer: