



show me the Money

A FINANCIAL WORKSHEET FOR COUPLES

www.theeverygirl.com

ASSETS

what you have or own, right now

MONETARY ASSETS

NAME _____
CASH _____
CHECKING _____
SAVINGS _____
OTHER _____

TOTAL _____

NAME _____
CASH _____
CHECKING _____
SAVINGS _____
OTHER _____

TOTAL _____

OTHER ASSETS

STOCKS _____
BONDS _____
MUTUAL FUNDS _____
RETIREMENT _____
HOME _____
CAR(S) _____
PERSONAL PROPERTY _____
OTHER _____

TOTAL _____

STOCKS _____
BONDS _____
MUTUAL FUNDS _____
RETIREMENT _____
HOME _____
CAR(S) _____
PERSONAL PROPERTY _____
OTHER _____

TOTAL _____

TOTAL _____



DEBT

what you owe, right now

CURRENT DEBTS

NAME _____
CREDIT CARD _____

STUDENT LOANS _____
CAR LOAN _____
PERSONAL LOAN _____
OTHER _____

TOTAL _____

NAME _____
CREDIT CARD _____

STUDENT LOANS _____
CAR LOAN _____
PERSONAL LOAN _____
OTHER _____

TOTAL _____

NET WORTH

your total assets minus your total debts

TOTAL ASSETS _____
-
TOTAL DEBT _____
=
NET WORTH _____

BUDGET

what you make + what you spend, monthly

MONTHLY INCOME

NAME _____
SALARY _____
FREELANCE /
SECONDARY _____
OTHER _____

TOTAL _____

NAME _____
SALARY _____
FREELANCE /
SECONDARY _____
OTHER _____

TOTAL _____

MONTHLY EXPENSES

RENT _____
LOANS _____
CREDIT CARD _____
INSURANCE _____
TAXES _____
UTILITIES _____
GROCERIES _____
DINING OUT _____
HEALTH _____

PET _____
AUTO _____
TRANSPORTATION _____
GYM _____
ENTERTAINMENT _____
GIFTS/CHARITY _____
OTHER _____

TOTAL LEFT TO SAVE



FINANCIAL PRIORITIES

what you put first when spending + saving

NAME _____

rank the below options, with 1 being the highest priority

HOME _____

CAR _____

RETIREMENT _____

VACATION _____

TRAVEL _____

ENTERTAINMENT _____

OTHER _____

NAME _____

rank the below options, with 1 being the highest priority

HOME _____

CAR _____

RETIREMENT _____

VACATION _____

TRAVEL _____

ENTERTAINMENT _____

OTHER _____

COMBINED SPENDING PRIORITIES

#1 _____
#2 _____
#3 _____
#4 _____
#5 _____
#6 _____
#7 _____
#8 _____

GOALS

where you want your money to go — now and in the future

SHORT TERM GOALS

GOAL

ACTIONABLE PLAN

LONG TERM GOALS

GOAL

ACTIONABLE PLAN

