THE KAKEIBO METHOD TEMPLATE

MY INCOME

Sources of income	Expected income (\$)	Actual income (\$)
1		
2		
3		
Total monthly income		

MY SAVINGS GOALS

Savings goals	Planned savings (\$)	Actual savings (\$)
1		
2		
3		
Total monthly savings		

MY MONTHLY EXPENSES

Expense category	What this includes	Budgeted (\$)	Actual (\$)
1			
2			
3			
4			
5			
6			
Total monthly expenses			



MY SPENDING TRACKER

Date	Description	Amount (\$)	Within budget? (Y/N)
			Yes No

TIME FOR REFLECTION

What worked well	What I can improve on

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This information is of a general nature and has been prepared without taking account of your personal needs, financial situation or objectives. Before acting on this information, you should consider whether the information is appropriate for you having regard to your personal needs, financial circumstances or objectives.

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