

Financial Tracking & Goals Template

1. Financial Tracking Table

Month	Income (Total)	Expenses	Profit	Notes (e.g., busy month, extra jobs)
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				
TOTAL				

- **Income:** Add up money received from each job
- **Expenses:** Include costs like petrol, materials, tools, internet, etc.
- **Profit:** Income minus Expenses

Action: to fill in the last 12 months if possible, or just the last 3 months to start.

2. What is your estimated profit for the last 12 months?

Use this space to write a rough estimate if full data isn't available:

Estimated Monthly Income: \$ _____
Estimated Monthly Expenses: \$ _____
Estimated Monthly Profit: \$ _____
Estimated Total Profit for the Year: \$ _____

3. Your Financial Goal

What would you like to achieve financially through your business? Choose one or write your own.

Examples:

- I want to pay myself a regular income of \$____ per month.
- I want to double my profit by this time next year.
- I want to save \$____ to buy new equipment or rent a workspace.
- I want to earn enough to reduce my hours at another job.

My goal:

4. Support Needed

What kind of support or coaching do you need?

(e.g., using Excel, understanding profit margins, pricing jobs, budgeting)
