

Monthly Budget Planner

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Open in Google Sheets (free)

1. Click the button below while signed in to any Google account.
2. Google asks "Copy document?" — click Make a copy. The planner is now in your own Drive, fully editable and private to you.
3. Bookmark your copy. This PDF link always opens a fresh, blank template.

COPY THE GOOGLE SHEETS TEMPLATE

If the button does not work, type this address into your browser:
<https://docs.google.com/spreadsheets/d/LINK-PENDING-import-to-Google-Sheets-first/copy>

Open in Microsoft Excel

Download the .xlsx file from your Etsy Purchases page and open it in Excel 365 or Excel 2021 (Windows or Mac). If Excel shows a yellow "Protected View" bar, click Enable Editing. There are no macros — everything is formulas.

Five-minute setup

1. Go to the Setup tab. Type your name, currency symbol, the month you want to start, your planned monthly income, and a monthly budget for each category (rename them freely).
2. Transactions tab: add one row per expense or income — date, description, category (dropdown), type, amount, account. This is the only daily task.
3. Bills tab: list every recurring bill once with its due day; tick "Paid this month?" as you pay them.
4. Savings Goals tab: add a target and a date for each goal — the sheet shows the monthly amount needed.
5. Dashboard: it always shows the current month. The Budget tab shows all 12 months side by side.

Good to know

- Gold cells are for you; white cells are calculated — please do not overwrite them.
- Do not delete tabs or header rows. The hidden "Data" tab powers the dashboard.
- Set up on a computer; the Sheets/Excel phone apps are fine for viewing and small edits afterwards.
- Sample data is there so you can see how it works — overwrite it with yours.

Need help?

Message me through Etsy (shop: AnchitLabs) — I reply within a day. If something looks wrong, send a screenshot and I will fix it.

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