

Gen X

Money Checkup

lite



MONTHLY

Budget

Budget Goal:

Month:

INCOME

Date	Description	Amount
Jan 12, 2030	This is the body text	This is the body text
Total		

FIXED EXPENSES

Date	Description	Amount
Jan 12, 2030	This is the body text	This is the body text
Total		

OTHER EXPENSES

Date	Description	Amount
Jan 12, 2030	This is the body text	This is the body text
Total		

BILLS

Date	Description	Amount
Jan 12, 2030	This is the body text	This is the body text
Total		

RECAP

	Goal	Actual	Difference
Earned	This is the body text	This is the body text	This is the body text
Spent			
Debt			
Saved			

"Your budget is not a cage—it is a tour manager. It keeps the chaos offstage so you can focus on the performance.."

— Retirement Rocksta

Where is Your Money Going?

Use this page to get a quick snapshot of your monthly money flow. No judgment—just clarity.

Monthly Income

- **Job(s):** _____
- **Side Hustle:** _____
- **Other:** _____

Fixed Expenses

- **Rent/Mortgage:** _____
- **Utilities:** _____
- **Insurance:** _____
- **Subscriptions:** _____

Flexible Spending

- **Groceries:** _____
- **Dining Out:** _____
- **Fun Stuff:** _____

Savings Contributions

- **Emergency Fund:** _____
- **Retirement:** _____
- **Other:** _____

Mood Check:

Circle one → I feel in control / I feel overwhelmed / I'm figuring it out

Let's Face the Numbers

(No Shame, Just Strategy)

DEBT	BALANCE	INTEREST RATE	MINIMUM PAYMENT	NOTES

Debt does not define you - it fuels your comeback

What Does Retirement Look Like for You?

- Current Retirement Savings: \$_____
- Retirement Goal Amount: \$_____
- Years Until Retirement: _____
- Monthly Savings Needed: \$_____

One Small Change I Can Make This Month: _____

Retirement isn't an age—it's a vibe.

Your Gen X Financial Jumpstart

- 1. Track your spending for 7 days—no judgment.**
- 2. Automate one savings transfer this week.**
- 3. Read one money book (Try: *I Will Teach You to Be Rich*).**
- 4. Talk money with your partner or bestie.**
- 5. Follow Retirement Rockstars for more tools.**

**Want the full planner + bonus tools?
Stay tuned for the premium bundle drop!**