



DIGITAL FINANCE PLANNER
UNDATED · ANY YEAR

My Savings Plan

Emergency fund, goals and savings challenges

11

linked pages

4

savings goals

52

week challenge

✓ Hyperlinked on every page

✓ Any currency

✓ GoodNotes · Notability · Xodo

E

Created by Evelyn

15 years of banking experience



Emergency fund

GOAL

3,000

SAVED

1,950



My progress

65 %



Savings goal

TRIP

1,500

MONTHLY

125



25%

50%

75%

100%

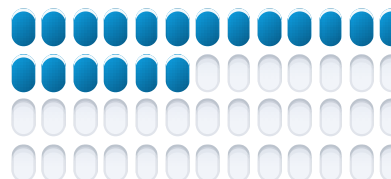


Sinking funds

FUND	YEARLY	MONTHLY
Insurance	600	50
Vacation	1,200	100
Gifts	360	30



52-week challenge



Start

Savings

My goals

Emergency

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BEFORE YOU BEGIN

How to use your planner



Open it in your notes app

Import the PDF into GoodNotes, Notability, Noteshell or Xodo (Android tablets work too). Write with a stylus or keyboard.

Do it now → Duplicate the PDF before writing: you'll keep a clean copy for next year.



Navigate with the tabs

In read-only mode, tap the tabs on the right to jump to each section. The "Start" tab takes you back to the index.

Do it now → In GoodNotes, switch to read-only mode (pen icon) so the tabs respond to a tap.



Pick your currency once

Write your currency in "My starting point". Every page works with dollars, euros, pesos or any currency.

Do it now → Amounts carry no symbol: it works for \$1,500 or 850,000 pesos alike.



Undated: start today

Start whenever you like. Write the start date on each page and reuse your clean copy whenever you need it.

Do it now → Fill in "My starting point" today: it's your baseline.



The ritual that works

Once a month, on payday: transfer to your goals and log the total (10 min). Consistency beats perfection.

Do it now → Schedule an automatic transfer to savings on payday.



No guilt

A bad month doesn't erase your progress. Note what happened, adjust and keep going. This planner is about understanding your money, not judging yourself.

Do it now → Start with "My starting point", then work out your emergency fund.

A banker's tip: write down real amounts, not ideal ones. The savings plan that works is the one you can keep up month after month, even if it starts small.



Start

Savings

My goals

Emergency

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MY SAVINGS PLAN

Contents



Starting point

Your snapshot and 3 key ratios



My goals

Short, medium and long term



Emergency fund

Work out your 3- and 6-month goal



Savings goals

4 goals with deposits and progress



Sinking funds

Yearly costs split into 12



52-week challenge

3 versions to build the habit



Notes

Ideas, maths and reminders



Your recommended path

1

Starting point

Where you are today

2

Emergency fund

Your safety net first

3

Goals

Amount, date and deposit

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Sinking funds

Costs you know are coming

5

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The habit, week by week



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