ELITE FINANCIAL WELLNESS ACADEMY

Money Matters

Small Steps. Stronger Futures.

Episode 01: Where Does My Money Go?

My Monthly Money Plan

Month: _____

Use monthly amounts. Leave a line blank if it does not apply.

1. Cash coming in

Take-home pay	$ _____
SSI, SSDI, pension or other cash income	$ _____
Total cash income (A)	$ _____

2. Bills and spending

Rent / mortgage	$ _____
Utilities, phone and internet	$ _____
Groceries paid with cash (do not include SNAP spending)	$ _____
Transportation, medicines and other costs	$ _____
Money to set aside for savings	$ _____
Total spending and savings (B)	$ _____

3. What is left?

Cash income (A) minus spending and savings (B)	$ _____

My next step: _____

_____

Track SNAP separately: Available $ _____ Planned food spending $ _____

If expenses are more than income, ask your care manager or a trusted person for help.

For community resources, visit NC211.org or call 888-892-1162.

For automatic totals, use My Money Plan on the Elite Community Connections website.

A simple planning worksheet. This is not a benefits eligibility calculation.