

Rockwell

Expert Financial Management

Your Budget Blueprint





Take Control of Your Money

Take Control of Your money in 4 simple steps

Budget doesn't need to feel restrictive - it's about financial freedom!

Step 1: Track Your Income

What to track:

- Salary
- Any Freelance income

A monthly income tracking table is great to visualise your income and expense, or download a budget tracking app.

Step 2: List Your Expenses

Essential Expenses:

- Rent/Mortgage
- Utilities
- Groceries
- Transport

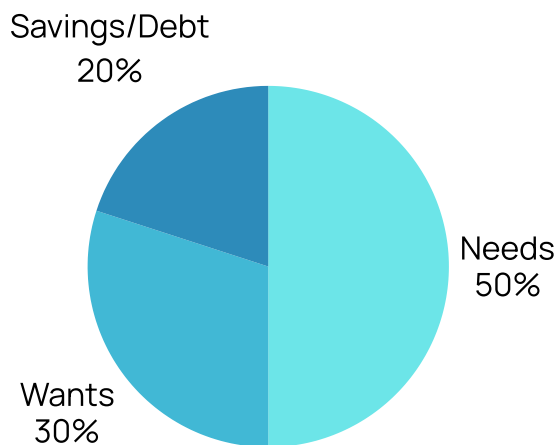
Non-Essential Expenses

- Subscriptions (Gym etc.)
- Dining out
- Entertainment

Step 3: Set Your Budget

Introduce the 50/30/20 rule.

- 50% Needs
- 30% Wants
- 20% Savings/Debt





Step 4: Track & Adjust

By tracking as you go, you can review your expenses and adjust where needed!

Weekly check-ins:

- Compare planned V Actual spend
- Allotted spending you can cut back or where you need to allow for more of a budget

Category	Item	Planned Amount	Actual Amount	Notes
Income	Salary			
	Freelance			
	Other Income			
Total Income				
Essential	Rent/Mortgage			
	Utilities (Electric, Gas, Water)			
	Internet/Phone			
	Groceries			
	Transport (Fuel/Public Transport)			
	Insurance			
	Loan Payments			
	Healthcare/Medicine			
Total Needs				
Non-Essential	Dining Out/Coffee			
	Entertainment			
	Subscriptions			
	Holidays			
Total Non-Essentials				
Savings/Debt	Emergency Fund			
	Debt Payments			
Total Savings/Debt				
Grand total				
Net Income				



Extra tips:

- Fill out your planned or expected amount at the start of the month
- Track actual amounts as you go

Your financial success is about more than numbers; it's about reaching goals and achieving peace of mind.

Our expert planners simplify the financial planning process, guiding you at every single stage with tailored solutions.

Whether you're navigating personal finances, managing business income, or preparing for retirement, we'll create a plan that grows with you.

[Book a Financial Planning Consultation Today!](#)



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