[Company name]

*How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue **[field]** until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.*

Monthly Budget Planner

Keeping spending inside the plan: budget by category, actual spend, variance, and notes, reviewed monthly.

Document	Monthly Budget Planner
Prepared by	**[Name and role]**
Owner	**[Name and role]**
Version	2.0
Date	**[DD Month YYYY]**
Review date	**[DD Month YYYY]**

Department / project	**[Department / project]**
Budget owner	**[Budget owner]**
Budget month	**[Budget month]**
Total monthly budget	**[Total monthly budget]**

Budget by category

Category	Budgeted	Notes

Actual spend

Category	Actual spend	Committed (ordered, not yet paid)

[Company name]

Category	Actual spend	Committed (ordered, not yet paid)

Variance

Category	Budgeted	Actual + committed	Variance	Variance %

Notes and explanations

Category	Explanation for the variance

Total budget	Total actual + committed	Overall variance

[Company name]

[Amount]	[Amount]	[Amount]

Next month adjustments

Category	Next month budget	Change and reason

Prepared by	
Reviewed by	[Finance contact]

Sign-off

Budget owner sign-off and date	

Checklist

Done	Check
	Every category shows budgeted, actual, committed, and variance.
	Variances are explained, not just reported as numbers.
	Next month's budget is adjusted and signed by the budget owner.