**[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 |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

## [Company name]

### Actual spend

| Category | Actual spend | Committed (ordered, not yet paid) |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

### Variance

| Category | Budgeted | Actual + committed | Variance | Variance % |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

### Notes and explanations

| Category | Explanation for the variance |
|---|---|
| | |
| | |
| | |
| | |

## [Company name]

| Category | Explanation for the variance |
|---|---|
| | |
| | |
| | |
| | |
| | |

| Total budget | Total actual + committed | Overall variance |
|---|---|---|
| [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** | |

## [Company name]

### 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. |