Holiday Budget Planner

Plan your spending. Enjoy the season.

That's Money! by Veridian Credit Union

1 Set your holiday budget

Start with the total amount you can comfortably spend.

Total budget	Actual spent	Amount remaining
$ _____	$ _____	$ _____

2 Divide your budget

Spending category	Budgeted	Actual
Gifts		
Celebrations and meals		
Travel		
Giving		
Seasonal extras		
Other		
Total		

3 Choose your payment sources

List the accounts or payment methods you plan to use.

Examples: checking, Holiday Club or other savings, cash, or a credit card.
Credit card purchases should fit within your total budget, not increase it.

Payment source	Planned amount	Actual amount
Total		

Plan gifts and celebrations

Use the totals from this page to complete your budget on page 1.

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4 Make your gift list

Recipient	Budgeted	Actual
Total		

5 Plan celebrations and meals

Examples: groceries, restaurant meals, party supplies or event tickets

Payment source	Planned amount	Actual amount
Total		

Plan the rest

Use the totals from this page to complete your budget on page 1.

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6 Plan category details

Travel

Airfare, fuel, lodging, meals or parking

Expense	Budgeted	Actual
Category total		

Giving

Donations, community causes or gifts

Expense	Budgeted	Actual
Category total		

Seasonal extras

Decorations, cards, wrapping or shipping

Expense	Budgeted	Actual
Category total		

Other

Expenses that do not fit another category

Expense	Budgeted	Actual
Category total		

For next year

Holiday Club savings goal $ _____

Save each month $ _____