

Helpful Tips For Getting The Greatest Benefit From Your Holiday Planner

****Start using this planner as early as you can in the year - but even if you start during the holiday season, it is tremendously effective at helping you stay organized and on track.****

Tab #1: Brain Dump: A brain dump is an effective way to get everything out of your head and into this spreadsheet to help you stay organized and stress free. Here's how to do it:

- * Make a list of all the tasks you have swirling in your head that you need to complete during the holiday season (this can be gift-related, meal-related, or event-related)
- * Once you have all your tasks entered, filter by the due date column to list your tasks in the order they need to be completed

Tab #2: Holiday Savings Plan: make a realistic holiday savings plan to hold yourself accountable throughout the year

****I recommend opening a separate savings account or having some other separate method for keeping these funds safe**

- * Enter your yearly savings goals in Cells D4, D5, & D6, as described
- * Update Column H as you add money to your holiday savings

Tab #3: Holiday Budget: create a holiday budget so your expenses do not

- * a formula pulls the total amount you have to spend "total budget" from another tab for your "running total saved"
- * estimate the amount you will spend in each category (and add any additional categories you need) in column B

* enter the actual amounts you spend in column C

Tab #4 Gift Brainstorming: this is your gift-giving brain dump. Write down all your ideas for gifts here so you don't forget anything and know where to find it & how much to budget for it.

Tab #5: Black Friday Deals: so many deals...so little time. Keep track of all the items you want to purchase on Black Friday/Cyber Monday, and any coupons or codes you will need.

Tab #6: Holiday Gift Record: keep track of every aspect of your gift buying and giving.

Tab #7: Holiday Activities: write down all of your upcoming events & activities so you don't forget anything.

Tab #8: Holiday Menu Planning: Keep track of recipes, ingredients to buy and more!

Tab #9: Goals for Next Year: start planning for next year now with a quick brain dump of what went well this year and what you would like to do differently next year (ex: lower spending goal).

Congratulations! You've successfully survived the holiday season! Make sure to retain a copy for next year. It will make planning SO MUCH easier if you start early in the next year!

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Disclaimer: Made In A Pinch, LLC provides this template for sale for informational purposes only, it is not meant to replace financial advice from a qualified professional who is familiar with your specific situation. Made In A Pinch's Holiday Planner should not be relied upon as professional financial advice. If you need professional advice, please seek paid help from a professional advisor such as a CPA in your local area.

Holiday Savings Plan

Savings Goals:

Savings Breakdown By Week

GOALS:		GOAL AMOUNT:		Week	Savings Needed	Actual Savings
Gifts:		\$ 775.00		1	\$ 29.81	\$ 42.00
Meals:		\$ 250.00		2	\$ 29.81	\$ 37.00
Cards & Gift Wrapping:		\$ 75.00		4	\$ 29.81	\$ 29.00
Tree & Decorations		\$ 25.00		5	\$ 29.81	
Travel		\$ 75.00		6	\$ 29.81	
Activities		\$ 200.00		7	\$ 29.81	
Charitable donations		\$ 150.00		8	\$ 29.81	
				9	\$ 29.81	
				10	\$ 29.81	
Total Savings Goal:		\$ 1,550.00		11	\$ 29.81	

					12	\$	29.81	
**in order to keep the formulas working properly, only change the grey shaded cells					13	\$	29.81	
					14	\$	29.81	
					15	\$	29.81	
Based on your goals:					16	\$	29.81	
Yearly Holiday Savings Goal			\$	1,550.00	17	\$	29.81	
Savings Per Week Needed			\$	29.81	18	\$	29.81	
Total Amount Saved This Year			\$	108.00	19	\$	29.81	
Stil Needed To Save Until Goal Is Reached:				\$	1,442.00	20	\$	29.81
					21	\$	29.81	
					22	\$	29.81	
					23	\$	29.81	
					24	\$	29.81	
					25	\$	29.81	
					26	\$	29.81	

27	\$	29.81	
28	\$	29.81	
29	\$	29.81	
30	\$	29.81	
31	\$	29.81	
32	\$	29.81	
33	\$	29.81	
34	\$	29.81	
35	\$	29.81	
36	\$	29.81	
37	\$	29.81	
38	\$	29.81	
39	\$	29.81	
40	\$	29.81	
41	\$	29.81	
42	\$	29.81	
43	\$	29.81	

44	\$	29.81	
45	\$	29.81	
46	\$	29.81	
47	\$	29.81	
48	\$	29.81	
49	\$	29.81	
50	\$	29.81	
51	\$	29.81	
52	\$	29.81	
53	\$	29.81	

Total Savings Goal:

\$1,550.00

Total Actual Savings:

\$108.00

Holiday Budget

Total Budget **\$1,550.00**

Item	Estimated Cost	Actual Cost	Difference
Gifts			\$ -
Meals			\$ -
Cards & Gift wrapping			\$ -
Tree & Decorations			\$ -
Travel			\$ -
Activities		\$ -	\$ -
Charitable donations			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -

Subtotals \$ - \$ - \$ -

OVER/UNDER BUDGET? \$1,550.00 \$1,550.00

Example of How to Fill in the Spreadsheet:

** In order for the formulas to work correctly, only change the numbers in Columns B and C in the chart to the left

Item	Estimated	Actual Cost	Difference
Family Member Gifts	\$ 490.00	\$ 525.00	\$ 35.00
Friends Gifts	\$ 220.00	\$ 179.00	\$ (41.00)
Meals	\$ 350.00	\$ 326.00	\$ (24.00)

Holiday Gift Tracker

<u>For Who?</u>	<u>Gift</u>	<u>Store</u>	<u>Cost</u>	<u>Purchased YES/NO</u>	<u>Wrapped YES/NO</u>	<u>Given On:</u>	<u>Who Left to Buy for? (delete names once gift is purchased)</u>
<i>Ted</i>	<i>Lego Set</i>	<i>Target</i>	<i>\$60.00</i>	<i>YES</i>	<i>YES</i>	<i>12/17/2019</i>	<i>Susie</i>
							<i>Beth</i>
							<i>Mike</i>
							<i>Mom</i>

Example:

Holiday Activities

	Event	Location	Date	Time	RSVP? YES/NO	Cost:	Notes
Example:	Luminary Walk	Town Square	12/3/2019	6:00 PM	NO	free	Arrive by 5:30 to park

Total Activities

\$ -

GOALS FROM PREVIOUS YEAR

GOALS:		GOAL AMOUNT:
Gifts:		\$ 775.00
Meals:		\$ 250.00
Cards & Gift		\$ 75.00
Tree & Decorations		\$ 25.00
Travel		\$ 75.00
Activities		\$ 200.00
Charitable		\$ 150.00
Total Savings Goal:		\$ 1,550.00
<i>**in order to keep the formulas working properly, only change the grey shaded cells</i>		

What went well this year (ex: got shopping done early)?

If you could pick one or two things to change and do differently next year, what would it be?

Revise Your Projected Budget For Next Year Here:

GOALS FOR NEXT YEAR

GOALS:		GOAL AMOUNT:	
Gifts:		\$	650.00
Meals:		\$	250.00
Cards & Gift		\$	75.00
Tree & Decorations		\$	25.00
Travel		\$	75.00
Activities		\$	200.00
Charitable		\$	150.00
Total Savings Goal:		\$	1,425.00
<i>**in order to keep the formulas working properly, only change the</i>			