

BUDGETING WORKSHEET

Monthly Income

ITEM	AMOUNT
Income 1	
Income 2	
Other	
Other	
Total	

Home

ITEM	AMOUNT
Mortgage/Rent	
Taxes	
Insurance	
Utilities	
Internet	
Cable/Satellite TV	
Trash	
Maintenance	

Car

ITEM	AMOUNT
Gas	
Insurance	
Services & Repairs	
Parking/Garage	
Loan/Lease Payment	
Other	

Family

	AMOUNT
Daycare/Babysitter	
Medical/Dental	

TOTAL

Getting an idea of your average household expenses will be helpful as we develop a savings or retirement income strategy.

Personal

ITEM	AMOUNT
Life Insurance	
Health Insurance	
Dental Insurance	
Personal Supplies	
Other Insurance	
School Tuition/Fees	
Student Loans	
Other Education	
Clubs/Memberships	
Travel	
Other	
Other	

Miscellaneous

ITEM	AMOUNT
Gifts / Donations	
Credit Card 1	
Credit Card 2	
Credit Card 3	
Loans	
Loans	
Pre-Tax Savings	
Taxable Savings	
Taxes	
Other	
Other	
Other	

TOTAL