



Budget Worksheet

While budgeting can seem like a daunting task, it could allow you more financial freedom once it is accomplished. This Budget Worksheet can help you determine your monthly spending.

MONTH: _____

YEAR: _____

Income

Monthly Total

Paychecks (salary after taxes and benefits)	\$
Other Income (after taxes), such as child support, etc.	\$
Total Monthly Income	\$

Expenses

Monthly Total

Housing Expenses	
• Mortgage or Rent	\$
• Homeowners's or Renter's Insurance (If not included in mortgage payment)	\$
• Utilities (Electricity, Gas, Cable, Internet)	\$
• Cell Phone	\$
• Other Housing Expenses (Including Maintenance)	\$

Food Expenses	
• Groceries and Household Supplies	\$
• Meals Out	\$
• Other Food Expenses	\$

Transportation Expenses	
• Car Loan/Lease Payment	\$
• Car Insurance	\$
• Gas	\$
• Parking and/or Tolls	\$
• Vehicle Maintenance	\$
• Public Transportation, Uber, Lyft, Taxi, Etc.	\$
• Other Transportation Expenses	\$

Health Care Expenses	
• Prescription Medicines	\$
• Gym Memberships	\$
• Other Health Expenses	\$



Expenses

Monthly Total

Expenses	Monthly Total
Personal and Family Expenses	
• Child Care	\$
• Clothing and Shoes	\$
• Dry Cleaning	\$
• Personal Grooming	\$
• Entertainment	\$
• Vacations	\$
• Life Insurance/Disability Premiums	\$
• Alimony or Child Support	\$
• Other Personal or Family Expenses	\$
Educational Expenses (For Yourself or Children)	
• Tuition	\$
• School Supplies	\$
• Student Loan Payments	\$
Other Expenses	
• Credit Card Payments	\$
• Other Expenses This Month	\$
•	\$
•	\$
•	\$
Total Monthly Expenses	\$

\$	-	\$	=	\$
Income		Expenses		

We are available to review your budget to help you determine where to trim expenses and to assist you in developing a savings strategy for your future goals. Please contact our office to schedule a complimentary budget analysis today.



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