

# Budget Worksheet

Income:	Monthly Amt:
Wages, Salaries & Tips	
Commission	
Bonuses	
Interest Income (Sav, CD, Bonds, etc.)	
Dividends (Stock, MF's, ETF's, etc)	
Gifts (Inheritance, Trust Fund, etc)	
Alimony &/or Child Support	
Penison(s) & Life Annuities	

Income:	Monthly Amt:
Social Security (Spouse 1)	
Social Security (Spouse 2)	
IRA Distributions (Spouse 1)	
IRA Distributions (Spouse 2)	
Rental Property	
Privately Funded Loans	
Other	
Other	

<b>Total Monthly Income</b>	
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Expenses:	Monthly Amt:
Household	
Mortgage Principal & Interest	
Real Estate Taxes	
Rent	
Insurance - Home/Rental	
Maintenance - Supplies	
Utilities - Gas/Electric	
Water - Sewer	
Cable - Phone - Internet	
House Cleaning	
Cell Phones	
Other	
Other	
<b>Total</b>	

Expenses:	Monthly Amt:
Transportation	
Auto Loan 1	
Auto Loan 2	
Auto Insurance	
Fuel	
Repairs	
Other	
Other	
<b>Total</b>	

Health	
Health Insurance	
Life Insurance	
LTC Insurance	
Disability Insurance	
Medicine - Drugs	
Veterinarian - Pet Care	
Other	
Other	
<b>Total</b>	

Daily Living	
Groceries	
Dining - Eating Out	
Clothing - Dry Cleaning - Laundry	
Salon - Massage - Manicure	
Other	
Other	
<b>Total</b>	

Debts, Loans	
Credit Cards	
Student Loans	
Alimony - Child Support	
Other	
Other	
<b>Total</b>	

Entertainment	
Home - Shows - Events	
Sports - Hobbies - Lessons	
Dues - Memberships	
Vacation - Travel	
Other	
Other	
<b>Total</b>	

Charity, Gifts	
Charitable Donations	
Gifts - Birthday - Christmas	
Other	
Other	
<b>Total</b>	

<b>Total Monthly Expenses</b>	
<b>Total Discretionary Income</b>	

