

Budget Worksheet

PREPARED FOR:

DATE: / /

You'll Need:

- A record of your monthly income and expenses
- A list of your goals, along with when you hope to achieve them and how much they'll cost

INCOME: MONTHLY AMOUNT

Salary (net: after taxes and benefits)	<input type="text"/>
Spouse's salary (net: after taxes and benefits)	<input type="text"/>
Pension income	<input type="text"/>
Social Security income	<input type="text"/>
Interest/investment income	<input type="text"/>
Other income (specify)	<input type="text"/>
Other income (specify)	<input type="text"/>
Other income (specify)	<input type="text"/>
TOTAL: Monthly Income Amount	<input type="text"/>

EXPENSES: MONTHLY AMOUNT

Fixed:	Spent	Budget
Mortgage or rent	<input type="text"/>	<input type="text"/>
Other real estate payments (taxes, assessments, etc.)	<input type="text"/>	<input type="text"/>
Auto loan	<input type="text"/>	<input type="text"/>
Student loan	<input type="text"/>	<input type="text"/>
Credit card payment	<input type="text"/>	<input type="text"/>
Utilities	<input type="text"/>	<input type="text"/>
Tuition	<input type="text"/>	<input type="text"/>
Child care	<input type="text"/>	<input type="text"/>
Food	<input type="text"/>	<input type="text"/>
Clothing	<input type="text"/>	<input type="text"/>
Insurance	<input type="text"/>	<input type="text"/>
Other expenses (specify)	<input type="text"/>	<input type="text"/>
Other expenses (specify)	<input type="text"/>	<input type="text"/>
Other expenses (specify)	<input type="text"/>	<input type="text"/>

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Variable (Discretionary):	Spent	Budget
Personal care (haircuts, gym membership, etc.)	<input type="text"/>	<input type="text"/>
Entertainment	<input type="text"/>	<input type="text"/>
IRA contributions	<input type="text"/>	<input type="text"/>
Dining out	<input type="text"/>	<input type="text"/>
Other expenses (specify)	<input type="text"/>	<input type="text"/>
Other expenses (specify)	<input type="text"/>	<input type="text"/>
Other expenses (specify)	<input type="text"/>	<input type="text"/>
Other expenses (specify)	<input type="text"/>	<input type="text"/>
Other expenses (specify)	<input type="text"/>	<input type="text"/>
TOTAL: Monthly Expenses Amount	<input type="text"/>	<input type="text"/>

Spent	<input type="text"/>	– Budget	<input type="text"/>	= TOTAL: Expected Savings	<input type="text"/>
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