



BUDGET WORKSHEET

	YOU	SPOUSE	MONTHLY TOTAL	ANNUAL TOTAL
HOUSING				
Mortgage/Rent				
Homeowners/Renters Insurance				
Property Taxes				
HOA/Condo Fees				
Repairs/Maintenance				
Improvement Projects				
Other				
UTILITIES				
Electricity				
Gas/Oil				
Water				
Sewage				
Trash				
Cell Phone				
Internet & Cable				
Other				
VEHICLE/TRANSPORTATION				
Loan/Lease				
Insurance				
Gas/Tolls				
Maintenance				
Other				
HEALTHCARE/INSURANCE				
Medical Premium				
Dental/Vision/Hearing Premium				
Prescriptions				
Out Of Pocket Co-Pays				
Life Insurance Premium				
Long-Term Care Premium				
Other				
INVESTING/SAVINGS				
Investments				
Emergency Savings				
Other				
PERSONAL				
Groceries				
Laundry/Dry Cleaning				
Clothing				
Other				
PAGE ONE SUBTOTAL				

BUDGET WORKSHEET

	YOU	SPOUSE	MONTHLY TOTAL	ANNUAL TOTAL
FAMILY CARE				
Support of Children/Grandchildren/Parents				
Other				
RECREATION/ENTERTAINMENT				
Memberships				
Hobbies				
Travel/Vacations				
Dining Out				
Movies/Theater/Sporting Events				
Streaming Subscriptions				
Other				
PET CARE				
Food				
Vet/Medicine				
Grooming/Boarding				
Other				
LAWN/GARDEN				
Landscaping/Mowing/ Snow Removal				
Other				
GIFTS				
Birthday				
Anniversary				
Other				
CHARITABLE GIVING				
Non-Profit Donations				
Other				
DEBT				
Credit Cards				
Unsecured Loans				
Other				
CUSTOM EXPENSES				
#1				
#2				
#3				
#4				
#5				
PAGE TWO SUBTOTAL				
PAGE ONE SUBTOTAL				
BUDGET TOTAL				



INCOME WORKSHEET

	YOU	SPOUSE	MONTHLY TOTAL	ANNUAL TOTAL
INCOME				
Income #1:				
Income #2:				
Income #3:				
Income #4:				
INCOME TOTAL:				
— BUDGET TOTAL (FROM PAGE 2):				
MONTHLY INCOME MINUS EXPENSES				

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