

# BUDGETING WORKSHEET



BENEFITS | WEALTH MANAGEMENT | RETIREMENT

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

| 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

| 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             |        |

TOTAL