



Client Name: _____

Date: _____

Budget Worksheet

NET INCOME: _____

Expenses:

Living Expenses:

Mortgage/Rent:	_____
2 nd Mortgage:	_____
Home Insurance:	_____
Property Taxes:	_____
Assessment:	_____
Condo Fees:	_____
Dining Out:	_____
Lunch at Work:	_____
Groceries:	_____
Bedding/Linens:	_____
Pet Expenses:	_____
Postage:	_____
_____	_____
_____	_____

Home Maintenance Expenses:

Furniture:	_____
Interior Repairs:	_____
Home Supplies:	_____
House Cleaning:	_____
Decorating:	_____
Lawn Mowing:	_____
Landscaper:	_____
Snow Blowing:	_____
Furnace Filters:	_____
Garbage:	_____
Security System:	_____
Water Softener Salt:	_____
Tree Trimming:	_____
Spring/Fall Cleanup:	_____
House Painting:	_____
Gardening:	_____
Plumber:	_____
Room Maintenance:	_____
Irrigation:	_____
Pest Maintenance:	_____
Water System:	_____
_____	_____
_____	_____

Personal Expenses:

Clothing: _____
Hosiery: _____
Shoes: _____
Haircuts: _____
Beauty Salon: _____
Jewelery: _____
Beauty Supplies: _____
Massage: _____
Manicure/Pedicure: _____
Alterations/Repairs: _____
Dry Cleaning: _____
Spousal Maintenance: _____

Utilities:

Electricity: _____
Gas: _____
Water: _____
Phone: _____
Cable TV: _____
Cell Phone: _____
Long Distance: _____
Pager: _____
Voicemail: _____
DSL/Internet: _____
Sewer/Septic: _____
Firewood: _____

Transportation:

Car Loan/Lease: _____
Gas: _____
Car Insurance: _____
Vehicle Tabs: _____
Car Washes: _____
Oil Changes: _____
Parking: _____
Maintenance: _____
Repairs: _____
Bus Pass: _____
Bikes: _____
Car Savings: _____

Medical:

Doctor Visits: _____
Health Insurance: _____

Eyeglasses/contacts: _____
Dental: _____
Medications: _____
Medicare Supplements: _____
LTC Insurance: _____
Life Insurance: _____
Disability Insurance: _____
Vitamins: _____
Non-Reimbursable: _____

Recreation:

Hobbies: _____
Relaxation: _____
Sport Activities: _____
Vacation: _____
Theatre: _____
Sports Events: _____
Movies: _____
Entertainment: _____
Home Entertaining: _____
Boat Expenses: _____
Boat Insurance: _____
Watercraft Expenses: _____
Watercraft Insurance: _____
Pool Expenses: _____

Memberships:

AAA: _____
Golf Club: _____
Country Club: _____
Sam's Club: _____
Costco: _____
Golf League: _____
Bowling League: _____
Other Leagues: _____
Health/Fitness Club: _____
Fish/Hunt Licenses: _____
Union Dues: _____

Debit/Credit Cards:

Savings:

401k/457/403b: _____
Roth/Traditional IRA: _____
Deferred Comp: _____
Liquid Money: _____
VUL Insurance: _____
Annuity: _____
Spending Money: _____
529/Ed IRA/UTMA: _____

Miscellaneous:

School Expenses: _____
Paper/copies: _____
Laundry: _____
Cards/Gifts: _____
Donations: _____
Travel: _____
Cigarettes: _____
Alcohol: _____
Magazines: _____
Books: _____
Accountant Fees: _____
Financial Fees: _____
Attorney Fees: _____
Income Taxes: _____
Safe Deposit Box: _____
Newspapers: _____

Kids Expenses:

Clothing: _____
Shoes: _____
Food: _____
Transportation: _____
School Expenses: _____
Cell Phone: _____
Lunch Money: _____
Personal Supplies: _____
Haircuts: _____
Babysitter: _____
Nanny: _____
Child Support: _____
Day Care: _____
Diapers: _____
Diaper Service: _____

Medical: _____
Summer Camp: _____
Activities: _____
Lessons: _____
Parenting Consultant: _____
Supervision: _____
Allowance: _____

KIDS EXPENSES _____
PERSONAL EXPENSES _____
TOTAL EXPENSES: _____
SHORT/OVER: _____