



Client Name: _____

Date: _____

Net income: _____

4300 Baker Road Minnetonka, MN 55343
www.prosperwell.com
763-231-9510

Budget Worksheet

Expenses:

Living Expenses:

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

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:	_____
Jewelry:	_____
Beauty Supplies:	_____
Makeup/Toiletries:	_____
Massage:	_____
Manicure/Pedicure:	_____
Alterations/Repairs:	_____
Dry Cleaning:	_____
Essentials:	_____
Spousal Maintenance:	_____
_____	_____
_____	_____

Utilities:

Electricity	_____
Gas:	_____
Water:	_____
Phone:	_____
Cable TV:	_____
Cell Phone:	_____
Sewer/Septic:	_____
Garbage:	_____
Recycling:	_____
Firewood:	_____
_____	_____
_____	_____

Transportation:

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

Medical:

Doctor Visits: _____
Eyeglasses/contacts: _____
Copays: _____
Health Ins. Premium: _____
Dental Ins. Premium: _____
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: _____
RV Storage: _____

Memberships:

AAA: _____
Golf Club: _____
Sam's Club: _____
Costco: _____
Golf League: _____
Bowling League: _____
Other Leagues: _____
Health/Fitness Club: _____
Fish/Hunt Licenses: _____
Union Dues: _____
Netflix/Hulu/ect.: _____
Newspaper: _____
Magazine: _____
Amazon Prime: _____
Peloton: _____

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:	_____
Therapist:	_____
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:	_____
Tutor:	_____
_____	_____

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

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