MY BUDGET WORKSHEET

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NAME(S): ______________________________

DATE: ______________________________

Gross Income

	Client	Co-Client	Joint
Wages, Salary and Tips	$	$	$
Business/Farm Income or Loss	$	$	$
Earned Income Subtotal	$	$	$
Dividends	$	$	$
Interest	$	$	$
IRA Distributions	$	$	$
Investment Income Subtotal (not reinvested)	$	$	$
Alimony	$	$	$
Pensions/Annuities	$	$	$
Rental Real Estate, Partnership, Trust	$	$	$
Social Security	$	$	$
Other	$	$	$
Other Income Not Subject to FICA Subtotal	$	$	$
Subtotal	$	$	$

Living Expenses

Mortgage/Rent	$	$
Homeowner’s/Renter’s Insurance	$	$
Health Insurance	$	$
Auto Insurance	$	$
Property Taxes (Real Estate/Vehicle)	$	$
Home Repairs/Maintenance	$	$
Utilities (Gas/Electric/Phone/Water/Garbage)	$	$
Groceries	$	$
Personal Goods (Toiletries/Dry Cleaning/Housekeeping)	$	$
Entertainment (Dining Out/Travel/Vacation)	$	$
Clothing	$	$
Gifts (Birthday/Holiday/Special Occasion)	$	$
Transportation (Gas/Taxis/Maintenance/Parking)	$	$
Charitable Contributions	$	$
Child Care (Lessons/Sports/Child Support)	$	$
Other	$	$
Subtotal	$	$

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NAME(S): ______________________

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Debts	Responsible Party	Balance	Monthly Payment Principal & Interest Only	Interest Rate	Lending Institution
Credit Card		$	$	%	
Automobile		$	$	%	
Automobile		$	$	%	
Subtotal		$	$	%	
Annual Subtotal		12x(subtotal)	$		

Life Insurance	Insurer Name	Owner	Beneficiary	Death Benefit	Cash Value	Annual Premium
Term				$	$	$
Group (Work)				$	$	$
Subtotal				$	$	$

Taxes	Annual
Federal Income Tax	$
State/Local Income Tax	$
Social Security Income Tax	$
Subtotal	$

Current Financial Commitments (Enter either monthly or annual amounts.)

	Client	Co-Client	Joint
Retirement Plan Balances [401(k), 403(b), IRA]	$	$	$
Personal Contribution	$	$	$
Employer Contribution	$	$	$
Retirement (Taxable) Contribution	$	$	$
Education Plan Balances (529, UTMA, Coverdell)	$	$	$
Personal Contribution	$	$	$
Other	$	$	$

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