

BUDGET

Gross Income

Category	Current Monthly Amount
Employment	\$
Social security	\$
Rental income	\$
	\$
Gifts	\$
	\$
	\$
	\$
Subtotal	\$

Personal and Family Expenses

Category	Current Monthly Amount
Alimony	\$
Bank charges	\$
Books/magazines	\$
Business expense	\$
Care of parent/other	\$
Cash – misc.	\$
Cell phone	\$
Charitable donations	\$
Child activities	\$
Child allowance/expense	\$
Child care	\$
Child support	\$
Child tutor	\$
Clothing – client	\$
Clothing – spouse	\$
Clothing – children	\$
Club dues	\$
Credit card debt payment	\$
Dining	\$
Education	\$
Entertainment	\$



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BUDGET *continued*

Category	Current Monthly Amount
Gifts	\$
Groceries	\$
Healthcare – dental	\$
Healthcare – medical	\$
Healthcare – prescription	\$
Healthcare – vision	\$
Hobbies	\$
Household items	\$
Laundry/dry cleaning	\$
Personal care	\$
Personal loan payment	\$
Pet care	\$
Public transportation	\$
Recreation	\$
Self-improvement	\$
Student loan payment	\$
Vacation/travel	\$
Savings	\$
	\$
	\$
	\$
	\$
Subtotal	\$

Personal Insurance Expenses

Category	Current Monthly Amount
Disability for client	\$
Disability for spouse	\$
Life for client	\$
Life for spouse	\$
LTC for client	\$
LTC for spouse	\$
Medical for client	\$
Medical for spouse	\$
Umbrella liability	\$
	\$
	\$
	\$
	\$
Subtotal	\$

Home Expenses

Description: _____

Category	Current Monthly Amount
First mortgage	\$
Second mortgage	\$
Equity line	\$
Real estate tax	\$
Rent	\$
Homeowner's insurance	\$
Association fees	\$
Electricity	\$
Gas/oil	\$
Trash pickup	\$
Water/sewer	\$
Cable/satellite TV	\$
Internet	\$
Telephone	\$
Lawn care	\$
Maintenance – major repair	\$
Maintenance – regular	\$
Furniture	\$
Household help	\$
	\$
	\$
	\$
Subtotal	\$

Vehicle Expenses

Description: _____

Category	Current Monthly Amount
Loan payment	\$
Lease payment	\$
Insurance	\$
Personal property tax	\$
Fuel	\$
Repairs/maintenance	\$
Parking/tolls	\$
Storage	\$
	\$
	\$
	\$
Subtotal	\$

Vehicle Expenses

Description: _____

Category	Current Monthly Amount
Loan payment	\$
Lease payment	\$
Insurance	\$
Personal property tax	\$
Fuel	\$
Repairs/maintenance	\$
Parking/tolls	\$
Storage	\$
	\$
	\$
	\$
Subtotal	\$

Taxes

Category	Current Monthly Amount
Client FICA	\$
Client Medicare	\$
Spouse FICA	\$
Spouse Medicare	\$
Federal income	\$
State income	\$
Local income	\$
401(k)	\$
403(b)	\$
	\$
	\$
	\$
Subtotal	\$

Income	Monthly Income
Total Income	\$

Expenses	Monthly Expenses
Personal and Family	\$
Personal Insurance	\$
Home	\$
Vehicle	\$
Taxes	\$
Total Expenses	\$

Things to remember:

- Your budget should reflect monthly projections.
- Your income should be gross, not net.
- At the end of each section, there are spaces for any other categories that we have not included above.