

Monthly or Yearly Budget

**Housing**

Mortgage(s) \_\_\_\_\_  
Property Tax \_\_\_\_\_  
Homeowner Insurance \_\_\_\_\_  
Maintenance \_\_\_\_\_  
Fees \_\_\_\_\_  
Miscellaneous \_\_\_\_\_  
Miscellaneous \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

**Utilities**

Electric \_\_\_\_\_  
Gas / Oil \_\_\_\_\_  
Water / Sewer \_\_\_\_\_  
Garbage \_\_\_\_\_  
Phones / Mobile \_\_\_\_\_  
Internet \_\_\_\_\_  
Cable \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

**Food**

Groceries \_\_\_\_\_  
Restaurants \_\_\_\_\_  
Vitamins / Supplements \_\_\_\_\_  
Misc. (pet food, etc) \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

Sub Total \_\_\_\_\_

**Transportation**

Car Payments/Maint. \_\_\_\_\_  
Gas \_\_\_\_\_  
Auto Insurance \_\_\_\_\_  
Parking \_\_\_\_\_  
Cab Service, Metro, Misc \_\_\_\_\_

**Medical**

Health Insurance \_\_\_\_\_  
Prescription \_\_\_\_\_  
Co Pays / Deductibles \_\_\_\_\_  
Assisted Care / Nursing \_\_\_\_\_  
Dental \_\_\_\_\_  
Veterinarian Exp. \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

**Personal**

Clothing \_\_\_\_\_  
Dry Cleaning \_\_\_\_\_  
Hair \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

**Entertainment**

Vacations / Travel \_\_\_\_\_  
Newspapers / Mag. \_\_\_\_\_  
Membership dues \_\_\_\_\_  
Movies \_\_\_\_\_  
Charities \_\_\_\_\_  
Recreation \_\_\_\_\_  
Theater \_\_\_\_\_

Sub Total \_\_\_\_\_

**Entertainment Continued**

Sports \_\_\_\_\_  
Club dues \_\_\_\_\_  
Misc. Spending \$\$ \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

**Savings Deposited to**

401k, 403b, Employer Plan \_\_\_\_\_  
Education (529) \_\_\_\_\_  
Investment Account \_\_\_\_\_  
IRA, Roth IRA \_\_\_\_\_  
Bank Account \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

**Debt Payments (other than mortgage)**

Credit Cards \_\_\_\_\_  
Loans \_\_\_\_\_  
Equity Lines \_\_\_\_\_  
Installments \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

**Additional Insurance**

Disability Ins. \_\_\_\_\_  
Long-Term Care \_\_\_\_\_  
Life Insurance \_\_\_\_\_  
Buy/Sell Agreements \_\_\_\_\_  
Liability / Umbrella Ins. \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

Sub Total \_\_\_\_\_

**Children / Dependents**

Child Care / Nanny \_\_\_\_\_  
Education Expenses \_\_\_\_\_  
Kids Activities \_\_\_\_\_  
Annual Gifting \_\_\_\_\_  
Elder Care \_\_\_\_\_  
Miscellaneous \_\_\_\_\_

**Taxes (Previous Year)**

Total Federal Paid \_\_\_\_\_  
Total State \_\_\_\_\_  
Total Local \_\_\_\_\_

**Other**

Business Expenses \_\_\_\_\_  
Investment Prop. Exp. \_\_\_\_\_  
Miscellaneous \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Grand Total \_\_\_\_\_

*\*We'll thoroughly review your budget with you – please don't let any single item or area slow you down. If unsure place a question mark in column and we'll discuss in detail.*

*Page is blank for your additional items / comments / notes*