

MONTHLY BUDGET

Date Completed: _____

INCOME

ITEM	BUDGET	ACTUAL
Gross Wages		
Gross Wages 2 (If Applicable)		
Bonus Income		
Investment Income		
Social Security Income		
Pension Income		
Annuity Income		
Child Support Income		
Alimony Income		
Credit Card Rebates		
Personal Loan Interest		
TOTAL		

EXPENSES

HOUSING	BUDGET	ACTUAL
House Payment		
Property Improvements		
Home Association Dues		
Household Incidentals (Supplies)		
Household Furnishings		
Other:		
Other:		
SUBTOTAL		

TAXES	BUDGET	ACTUAL
Federal Income Withholding		
State Income		
Medicare		
Social Security (FICA)		
Federal income Estimated Payments		
SUBTOTAL		

EXPENSES (Cont.)

FOOD	BUDGET	ACTUAL
Groceries		
Dining Out		
At Work		
At School		
Other:		
Other:		
SUBTOTAL		

CLOTHING	BUDGET	ACTUAL
Clothing		
Dry Cleaning		
Other:		
Other:		
SUBTOTAL		

PERSONAL CARE	BUDGET	ACTUAL
Hair		
Personal Care Items		
Other:		
Other:		
SUBTOTAL		

AUTOMOBILE	BUDGET	ACTUAL
Monthly Payment		
Operating Expenses (Gas, Oil, Etc.)		
Other:		
Other:		
SUBTOTAL		

EXPENSES (Cont.)

PROPERTY TAX	BUDGET	ACTUAL
Automobile		
House		
Boat		
Trailer		
Other:		
Other:		
SUBTOTAL		

UTILITIES	BUDGET	ACTUAL
Home Phone		
Cell Phone		
Water		
Electric		
Gas		
Trash Removal		
Water		
Electric		
Gas		
Trash Removal		
SUBTOTAL		

ENTERTAINMENT	BUDGET	ACTUAL
Subscriptions (Movies, Music, Etc.)		
Books, Newspapers, Magazines		
Parties		
Movies (Theater and Plays)		
Club Dues (Golf, Music, Etc.)		
Other:		
SUBTOTAL		

EXPENSES (Cont.)

UNREIMBURSED BUSINESS EXPENSES	BUDGET	ACTUAL
Travel		
Vehicle Rental		
Parking		
Lodging		
Meals		
Entertainment		
Other:		
Other:		
SUBTOTAL		

ALIMONY	BUDGET	ACTUAL
Alimony (Paid)		
SUBTOTAL		

CHILD SUPPORT	BUDGET	ACTUAL
Child Support (Paid)		
SUBTOTAL		

CHILDREN'S EXPENSES	BUDGET	ACTUAL
Lessons, Sports, Camps, Etc.		
Daycare		
Domestic Help (Babysitter, Etc.)		
Other:		
Other:		
SUBTOTAL		

GIFTS	BUDGET	ACTUAL
Birthdays		
Christmas / Other Holiday		
Anniversaries		
Other:		
Other:		
SUBTOTAL		

EXPENSES (Cont.)

CHARITABLE CONTRIBUTIONS	BUDGET	ACTUAL
Church		
School		
Other:		
Other:		
SUBTOTAL		

MEDICAL EXPENSES	BUDGET	ACTUAL
Doctor Visit Copay		
Prescription Copay		
Dental		
Vision		
Deductible		
Other:		
SUBTOTAL		

CREDIT CARD / BANK FEES	BUDGET	ACTUAL
Bank Fees / Overdraft Charges		
Line of Credit Interest Expense		
Other:		
SUBTOTAL		

INSURANCE	BUDGET	ACTUAL
Health		
Automobile		
Homeowners		
Renters		
Life		
Disability		
Long-Term Care		
Umbrella Liability		
Professional Liability		
Other:		
SUBTOTAL		

TOTAL EXPENDITURES	BUDGET	ACTUAL
TOTAL		

	BUDGET	ACTUAL
TOTAL INCOME (From Page 1)		
TOTAL EXPENDITURES		
MINIMUM DEBT PAYMENTS (Last Page)		

MONTHLY SURPLUS BEFORE SAVINGS		
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MINUS

PLANNED SAVINGS TRANSFERS (Last Page)		
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TOTAL MONTHLY SURPLUS (DEFICIT)		
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DEBT PAYMENT (MINIMUMS DUE)

CREDIT CARDS	BUDGET	ACTUAL
Credit Card #1		
Credit Card #2		
Credit Card #3		
Credit Card #4		
Other:		
Other:		
SUBTOTAL		

OTHER LIABILITIES	BUDGET	ACTUAL
Student Loans		
Personal Loans		
Business Loans		
Other Debts:		
Other Debts:		
SUBTOTAL		

TOTAL MINIMUM DEBT PAYMENTS	BUDGET	ACTUAL
TOTAL		

SAVINGS TRANSFERS(IMMEDIATELY NECESSARY)	BUDGET	ACTUAL
FSA/HSA		
Retirement Plan 1:		
Retirement Plan 2:		
IRA (Roth, SEP, Traditional)		
Employee Stock Purchase Plan		
Emergency Plan		
Retirement Plan 2:		
IRA (Roth, SEP, Traditional)		
Employee Stock Purchase Plan		
Emergency Plan		
SUBTOTAL		

TOTAL SAVINGS TRANSFERS	BUDGET	ACTUAL
TOTAL		