

Planning Tools

Monthly Budget Worksheet

Expenses

Household:

Mortgage/Rent	<input type="text"/>
Utilities	<input type="text"/>
Home Insurance & Taxes	<input type="text"/>
Maintenance	<input type="text"/>
Other	<input type="text"/>

Transportation:

Auto Payment	<input type="text"/>
Auto Insurance & Taxes	<input type="text"/>
Auto Maintenance	<input type="text"/>
Gas	<input type="text"/>
Public Transportation	<input type="text"/>
Other	<input type="text"/>

Debt Payments:

Student Loan Payments	<input type="text"/>
Credit Card Payments	<input type="text"/>
Other	<input type="text"/>

Food:

Groceries	<input type="text"/>
Lunch	<input type="text"/>
Meals Out	<input type="text"/>
Other	<input type="text"/>

Healthcare:

Doctor	<input type="text"/>
Dentist	<input type="text"/>
Prescriptions	<input type="text"/>
Other	<input type="text"/>

Miscellaneous:

Savings and Investments	<input type="text"/>
Education	<input type="text"/>
Clothing	<input type="text"/>
Personal care	<input type="text"/>
Child care	<input type="text"/>
Leisure/Vacation	<input type="text"/>
Gifts & Charity	<input type="text"/>
Entertainment	<input type="text"/>
Health club membership	<input type="text"/>
Other	<input type="text"/>

Total Monthly Spending

Knowing your needs and sticking to a budget is a powerful tool

To make sure you are living within your means and staying on track to meet your goals, use this worksheet to keep track of your expenses.

This worksheet can be saved and modified as your needs change.

[Download other worksheets](#)