

Simple Budget Form

Income

Estimate annual amounts

	Client	Spouse
Employment		
Salary / wages	<input type="text"/>	<input type="text"/>
Commissions	<input type="text"/>	<input type="text"/>
Bonuses	<input type="text"/>	<input type="text"/>
Self-employment income	<input type="text"/>	<input type="text"/>
Investments		
Interest income	<input type="text"/>	<input type="text"/>
Dividend income	<input type="text"/>	<input type="text"/>
Capital gain income	<input type="text"/>	<input type="text"/>
Rental / royalty income	<input type="text"/>	<input type="text"/>
Partnership / S-corp income	<input type="text"/>	<input type="text"/>
Retirement		
IRA distributions	<input type="text"/>	<input type="text"/>
401k / 403b withdrawals	<input type="text"/>	<input type="text"/>
Pension / annuity income	<input type="text"/>	<input type="text"/>
Other		
Social Security benefits	<input type="text"/>	<input type="text"/>
Disability / SSI benefits	<input type="text"/>	<input type="text"/>
Alimony / child support	<input type="text"/>	<input type="text"/>
Other income	<input type="text"/>	<input type="text"/>
	Total	

Use this space to describe any changes you expect in your income sources over the next five years.

Income

Expenses

Surplus/(Deficit)

Expenses

Estimate annual amounts for each relevant category.

Food

Groceries

Dining out

Housing

Mortgage / rent

Second mortgage

Property taxes

Association fees

Repairs / maintenance

Utilities

Phone

Internet

Television

Electric

Gas / heating oil

Water / sewer

Trash removal

Transportation

Vehicle loan / lease pmts

Gas / oil

Repairs / maintenance

Parking, tolls, storage, etc.

Debt Repayment

Credit cards

College/school loans

Other obligations

Savings / Investments

IRA contributions

401k / 403b contributions

529 plan contributions

Other savings / investment

Health Care

Health insurance premiums

Prescriptions

Unreimbursed medical exp.

Insurance Premiums

Life

Disability

Long term care

Homeowners / renters

Vehicle / automobile

Other insurance

Personal

Child care

Adult custodial care

Tuition / fees

Clothing / grooming

Spending money (client)

Spending money (spouse)

Spending money (depend.)

Recreation

Vacations / travel

Sport / activity fees

Subscriptions / memberships

Hobby expenses

Other recreation

Other Expenses

Gifts (birthdays, holidays, etc.)

Charitable donations

Domestic help

Alimony / child support

Pet food / care

Work-related expenses

Business / investment exp.

Late fees / penalties

Other expenses

Income Taxes

Federal

State

Local

FICA

Total