



FILLABLE BUDGET WORKSHEET

Household	
Mortgage Principle & Interest	\$
Real Estate Taxes	\$
Rent	\$
Insurance - Home/Rental	\$
Maintenance - Supplies	\$
Utilities - Electric/Gas	\$
Water - Sewer	\$
Cable - Phone - Interest	\$
House Cleaning	\$
Other	\$
Other	\$
Total	\$

Daily Living	Monthly Amount
Groceries	\$
Dining - Eating Out	\$
Clothing	\$
Salon - Massage - Manicure	\$
Other	\$
Other	\$
Total	\$

Entertainment	Monthly Amount
Home - Shows - Events	\$
Sports - Hobbies - Lessons	\$
Dues - Memberships	\$
Vacation - Travel	\$
Other	\$
Other	\$
Total	\$

Transportation	Monthly Amount
Auto Loans	\$
Auto Insurance	\$
Fuel	\$
Repairs	\$
Other	\$
Other	\$
Total	\$

Health	Monthly Amount
Health Insurance	\$
Life Insurance	\$
LTC Insurance	\$
Disability Insurance	\$
Medicine - Drugs	\$
Veterinarian - Pet Care	\$
Other	\$
Other	\$
Total	\$

Debts, Loans	Monthly Amount
Credit Cards	\$
Student Loans	\$
Alimony - Child Support	\$
Other	\$
Other	\$
Total	\$

Charity, Gifts	Monthly Amount
Charitable Gifts	\$
Gifts	\$
Other	\$
Other	\$
Total	\$

The information provided in the analysis is an overview and may not be a complete depiction of your financial concerns or outlook.

Client Initials _____ Client Initials _____ Agent Initials _____ Date _____