

Basic Budget Worksheet

Item plan	Actual %	Suggested %*	12 month
Housing	25-35%		_____
Transportation	10-15%		_____
Charitable Gifts	10-12%		_____
Food	5-15%		_____
Saving	5-10%		_____
Utilities	5-10%		_____
Medical/Health	5-10%		_____
Debt	5-10%		_____
Clothing	2-7%		_____
Miscellaneous	12-23%		_____

*These percentages are adapted from Dave Ramsey's *The Total Money Makeover* (Thomas Nelson, 2007).

My Life and Financial Goals Worksheet

How would you define or describe your life purpose?

What are three goals that can help you to achieve this life purpose?

What are some financial goals that can help to support your life goals and purpose?

Short-term financial goals (next 12 months):

1.

2.

Mid-range financial goals (2-5 years):

1.

2.

Long-term financial goals (5 years to retirement):

1.

2.