

# Monthly/Annual Income & Expenses

INCOME	Monthly
Wages & Tips	
Interest Income	
Dividends	
Gifts Received	
Refunds/Reimbursements	
Pension	
Other:	
Other:	
<b>TOTAL INCOME</b>	

HOME EXPENSES	Monthly
Mortgage/Rent	
Utilities	
Phone/TV/Internet/Cell Phone	
Furnishings/Appliances	
Lawn/Garden	
Home Supplies	
Maintenance	
Other:	
<b>TOTAL HOME EXPENSES</b>	

DAILY LIVING	Monthly
Groceries	
Personal Care	
Coffee/Lunch/Etc.	
Other:	
Other:	
<b>TOTAL DAILY LIVING</b>	

HEALTH	Monthly
Doctor/Dentist	
Medicine/Drugs	
Other:	
<b>TOTAL HEALTH</b>	

VACATION	Monthly
Annual Cost Divided by 12	
Other:	
<b>TOTAL VACATION</b>	

NOTES

CHILDREN	Monthly
Medical	
School Tuition/Meals	
Daycare/Babysitting	
Toys/Games/Entertainment	
Other:	
<b>TOTAL CHILDREN'S</b>	

TRANSPORTATION	Monthly
Car Payments	
Fuel	
Bus/Taxi/Train Fare/Tolls	
Repairs	
Other:	
<b>TOTAL TRANSPORTATION</b>	

INSURANCE	Monthly
Auto	
Health	
Home/Rental	
Life	
Long Term Care	
Other:	
<b>TOTAL INSURANCE</b>	

OBLIGATIONS	Monthly
Student Loan	
Other Loan	
Credit Card(s)	
Alimony/Child Support	
Federal Taxes	
State/Local Taxes	
Other:	
<b>TOTAL OBLIGATIONS</b>	

CHARITY/GIFTS	Monthly
Gifts Given	
Charitable Donations	
Other:	
<b>TOTAL CHARITY/GIFTS</b>	

BUDGET SUMMARY	Monthly
Total Income	
Total Expenses	
<b>NET INCOME/EXPENSES</b>	

<b>ANNUAL INCOME</b>
<b>ANNUAL EXPENSES</b>
<b>ANNUAL NET:</b>

ENTERTAINMENT	Monthly
Country Club	
Gym	
Concerts/Plays/Movies	
Dining Out	
Hobbies	
Other:	
<b>TOTAL ENTERTAINMENT</b>	

PETS	Monthly
Food	
Medical	
Other:	
<b>TOTAL PET EXPENSE</b>	

SAVINGS	Monthly
Retirement (401k, IRA)	
Investments/Savings	
College	
Other:	
<b>TOTAL SAVINGS</b>	

MISCELLANEOUS	Monthly
Other:	
Other:	
Other:	
Other:	
Other:	
Other:	
Other:	
Other:	
<b>TOTAL MISCELLANEOUS</b>	



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