BUDGET WORKSHEET

Name:			ADDITIONAL CASH		HOME	
			Part-time Job		Home Option:	
^{Occupation:} Comedian			Personal Loan (Full Amount)		Payment (Principal/Interest)	
					Taxes, Insurance & PMI*	
Spouse's Occupation: N/A			Tota	ıl	Rent	
Number of Children: None			DEBTS AND LOANS		Renter's Insurance	
			Student Loans		Electricity & Heat	
INCOME			Credit Cards	\$180	Water & Trash	
Monthly Net		\$2,643	Personal Loan (Monthly Amount)	Furniture	
Spouse's Monthly Net		N/A			Home Decor	
			Tota	al		
	Tota	1 \$2,643	SAVINGS		(*private mortgage insurance) Total	
Credit Score 700	+ or -	New Score	Savings (Emergency Fund)		DAILY LIVING	j
List table here			Retirement/Investments		(If child is under 1-year, do not include in fami	ly size.)
List table here			(Compound Interest)		Dining Out (Select 1)	
List table here			Tota	al	Incidentals (1 or More)	
List table here			FAMILY L	(FE		
WHEEL OF REALITY			(If child is under 1-year, must do 1-3)			
Unexpected Expense -			Groceries (Select 1)		Clothing (Select 1)	
Unexpected Income +			1. Formula or Nursing		Outwear (Select 1)	
			2. Diapers		Accessories (1 or More)	
Total		3. Baby Wipes				
			Childcare		1	
Notes:			Additional Accessories		1	
1) Visit every table.			Pets (Optional)		Personal Care (1 or More)	
2) Total expenses for each section.			Church (Optional)		1	
3) Carry each total to back page final balance.			Charity (Optional)			
4) Meet with financi	al advisor to	review	-			
your budget.			Tota	1	Total	



BUDGET WORKSHEET

AUTOMOTIVE	COMMUNICATIONS	FINAL BALANCE	
Vehicle(s):	Communications Option:	List totals from each category below	
Monthly Payment (Car 1)	Cell Service	Income +	
Monthly Payment (Car 2)	Internet		
Car Insurance (Car 1 &/or Car 2)	Cable TV	Additional Cash +	
Gas	Streaming Services	Income Subtotal	
Other Transportation	Bundle Discount -	Savings -	
Repairs		Debts and Loans -	
Total	Total	Family Life -	
HEALTH	ENTERTAINMENT/HOBBIES	Home -	
Premium (Single or Family)	1.	Daily Living -	
Deductible (can be divided by 12)	2.		
Coverage (can be divided by 12)	3.	Transportation -	
Co-Pay		Health -	
Prescriptions		Communications -	
Vitamins			
No Insurance		Entertainment/Hobbies -	
		Expenses Subtotal	
Total	Total		
Notes:		Wheel of Reality + or -	
		·	
		Total	
		Under Budget +	
		Over Budget -	