

BUDGET WORKSHEET

Name:		
Occupation: Freight Handler		
Spouse's Occupation: Interior Designer		
Number of Children: None		
INCOME		
Monthly Net	\$2,371	
Spouse's Monthly Net	\$3,423	
Total		\$5,794
Credit Score 700	+ or -	New Score
<i>List table here</i>		
<i>List table here</i>		
<i>List table here</i>		
<i>List table here</i>		
WHEEL OF REALITY		
Unexpected Expense	-	
Unexpected Income	+	
Total		
Notes:		
1) Visit every table.		
2) Total expenses for each section.		
3) Carry each total to back page final balance.		
4) Meet with financial advisor to review your budget.		

ADDITIONAL CASH	
Part-time Job	
Personal Loan (Full Amount)	
Total	
DEBTS AND LOANS	
Student Loans	\$75
Credit Cards	\$30
Personal Loan (Monthly Amount)	
Total	
SAVINGS	
Savings (Emergency Fund)	
Retirement/Investments	
(Compound Interest)	
Total	
FAMILY LIFE	
<i>(If child is under 1-year, must do 1-3)</i>	
Groceries (Select 1)	
1. Formula or Nursing	
2. Diapers	
3. Baby Wipes	
Childcare	
Additional Accessories	
Pets (Optional)	
Church (Optional)	
Charity (Optional)	
Total	

HOME	
Home Option:	
Payment (Principal/Interest)	
Taxes, Insurance & PMI*	
Rent	
Renter's Insurance	
Electricity & Heat	
Water & Trash	
Furniture	
Home Decor	
<i>(*private mortgage insurance)</i> Total	
DAILY LIVING	
<i>(If child is under 1-year, do not include in family size.)</i>	
Dining Out (Select 1)	
Incidentals (1 or More)	
Clothing (Select 1)	
Outwear (Select 1)	
Accessories (1 or More)	
Personal Care (1 or More)	
Total	

