



BUDGET WORKSHEET

HOUSING	
Mortgage or rent payments	
Real estate taxes	
Insurance	
Electric, gas and heating	
Water and sewer	
Telephone	
Cable	
Internet	
Cell phone	
Garbage	
Cleaning, repairs, maintenance	
Other: Netflix, Amazon Prime, etc	
TOTAL HOUSING	\$0

FOOD	
Home consumption	
Outside the home	
TOTAL FOOD	\$0

CLOTHING	
Clothing and shoes	
Cleaning and laundry	
TOTAL CLOTHING	\$0

TRANSPORTATION	
Auto payments	
Auto insurance	
Gas	
Repairs and maintenance	
Public transportation	
Other:	
TOTAL TRANSPORTATION	\$0

DEBT	
Credit and charge cards	
Installment loan:	
Installment loan:	
Installment loan:	
Other:	
TOTAL DEBT	\$0

MEDICAL	
Health insurance	
Out of pocket expenses: doctors	
Out of pocket expenses: dentist	
Out of pocket expenses: vision	
Medicines	
Other:	
TOTAL MEDICAL	\$0

PERSONAL AND LEGAL	
Toiletries and cleaning supplies	
Personal care (i.e. hair)	
Child care	
Pet care	
Legal and accounting	
Life insurance	
Disability insurance	
Long-term care insurance	
Other:	
TOTAL PERSONAL AND LEGAL	\$0

SAVINGS AND INVESTMENTS	
Retirement accounts	
Taxable investment accounts	
Education fund	
Other savings goals	
Other:	
TOTAL SAVINGS & INVESTMENTS	\$0

MISCELLANEOUS	
Books, magazines & newspapers	
Vacations	
Entertainment and clubs	
Hobbies and recreation	
Charitable contributions	
Important lifestyle needs:	
Gifts	
Other:	
TOTAL MISCELLANEOUS	\$0

TOTAL MONTHLY BUDGET	\$0
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