

# Budget Worksheet

**Input in shaded areas only**

## Net Income

|            | Frequency | Amount | Monthly | Yearly |
|------------|-----------|--------|---------|--------|
| Net Salary | Monthly   |        | \$ -    | \$ -   |
| Net Salary | Monthly   |        | \$ -    | \$ -   |
| Other      | Monthly   |        | \$ -    | \$ -   |

## Savings

|              |         |  |      |      |
|--------------|---------|--|------|------|
| Savings Goal | Monthly |  | \$ - | \$ - |
|--------------|---------|--|------|------|

## Expenses

|                    | Frequency | Amount | Monthly | Annual |
|--------------------|-----------|--------|---------|--------|
| <b>Home</b>        |           |        |         |        |
| Mortgage           | Monthly   |        | \$ -    | \$ -   |
| Rent               | Monthly   |        | \$ -    | \$ -   |
| Maintenance        | Monthly   |        | \$ -    | \$ -   |
| Insurance          | Monthly   |        | \$ -    | \$ -   |
| Furniture          | Annual    |        | \$ -    | \$ -   |
| Household Supplies | Monthly   |        | \$ -    | \$ -   |
| Property Tax       | Semi-Ann. |        | \$ -    | \$ -   |
| Other              | Monthly   |        | \$ -    | \$ -   |
| Other              | Monthly   |        | \$ -    | \$ -   |

## Transportation

|                    |           |  |      |      |
|--------------------|-----------|--|------|------|
| Auto(s) Loan/Lease | Monthly   |  | \$ - | \$ - |
| Insurance          | Monthly   |  | \$ - | \$ - |
| Gas                | Weekly    |  | \$ - | \$ - |
| Maintenance        | Quarterly |  | \$ - | \$ - |
| Registration       | Annual    |  | \$ - | \$ - |
| Other              | Monthly   |  | \$ - | \$ - |
| Other              | Monthly   |  | \$ - | \$ - |

## Miscellaneous

|              |         |  |      |      |
|--------------|---------|--|------|------|
| Dry Cleaning | Monthly |  | \$ - | \$ - |
| New Clothes  | Monthly |  | \$ - | \$ - |
| Donations    | Monthly |  | \$ - | \$ - |
| Personal     | Monthly |  | \$ - | \$ - |
| Child Care   | Monthly |  | \$ - | \$ - |
| Tuition      | Monthly |  | \$ - | \$ - |
| Gifts        | Monthly |  | \$ - | \$ - |
| Pocket \$    | Weekly  |  | \$ - | \$ - |
| Other        | Monthly |  | \$ - | \$ - |
| Other        | Monthly |  | \$ - | \$ - |

## Debt Payments (not auto or mortgage)

|              |         |  |      |      |
|--------------|---------|--|------|------|
| Credit Cards | Monthly |  | \$ - | \$ - |
| Other        | Monthly |  | \$ - | \$ - |
| Other        | Monthly |  | \$ - | \$ - |

## Goals (top 3)

|  |
|--|
|  |
|  |
|  |

## Summary (Annual)

|                         |      |
|-------------------------|------|
| <b>Total Net Income</b> | \$ - |
| <b>Total Savings</b>    | \$ - |
| <b>Total Expenses</b>   | \$ - |
| <b>Leftover/Buffer</b>  | \$ - |

|                  | Frequency | Amount | Monthly | Annual |
|------------------|-----------|--------|---------|--------|
| <b>Utilities</b> |           |        |         |        |
| Phone-home       | Monthly   |        | \$ -    | \$ -   |
| Phone-cell       | Monthly   |        | \$ -    | \$ -   |
| Cable            | Monthly   |        | \$ -    | \$ -   |
| Gas              | Monthly   |        | \$ -    | \$ -   |
| Electricity      | Monthly   |        | \$ -    | \$ -   |
| Water            | Monthly   |        | \$ -    | \$ -   |
| Internet         | Monthly   |        | \$ -    | \$ -   |
| Other            | Monthly   |        | \$ -    | \$ -   |
| Other            | Monthly   |        | \$ -    | \$ -   |

## Health

|            |         |  |      |      |
|------------|---------|--|------|------|
| Dental     | Annual  |  | \$ - | \$ - |
| Medical    | Annual  |  | \$ - | \$ - |
| Medication | Monthly |  | \$ - | \$ - |
| Vision     | Annual  |  | \$ - | \$ - |
| Insurance  | Monthly |  | \$ - | \$ - |
| Other      | Annual  |  | \$ - | \$ - |
| Other      | Annual  |  | \$ - | \$ - |

## Entertainment

|               |         |  |      |      |
|---------------|---------|--|------|------|
| Memberships   | Monthly |  | \$ - | \$ - |
| Dining Out    | Monthly |  | \$ - | \$ - |
| Events        | Monthly |  | \$ - | \$ - |
| Subscriptions | Annual  |  | \$ - | \$ - |
| Movies        | Monthly |  | \$ - | \$ - |
| Music         | Monthly |  | \$ - | \$ - |
| Hobbies       | Monthly |  | \$ - | \$ - |
| Travel/Vac.   | Annual  |  | \$ - | \$ - |
| Other         | Monthly |  | \$ - | \$ - |
| Other         | Monthly |  | \$ - | \$ - |

## Food

|           |         |  |      |      |
|-----------|---------|--|------|------|
| Groceries | Monthly |  | \$ - | \$ - |
| Lunches   | Weekly  |  | \$ - | \$ - |
| Other     | Monthly |  | \$ - | \$ - |

**See "Reports" tab once spreadsheet is completed!**