Monthly Budget Worksheet

Income

Monthly	Client	Spouse	%
Salary / Income			
Deductions			
Retirement Plan Contribution			
Health / Life Insurance			
Taxes			
Dues			
ATM Withdrawals			

Property

	Payment	Balance	Rate	
Mortgage				
Taxes				
Insurance				
Second / Equity Line				
Vacation / Rental				
Association Dues				
Car Loan/Lease				
Car Loan/Lease				
Credit Card				
Credit Card				Total Debt

Insurance

Auto	
Life	

Utilities

Cell / Mobile	
Electricity	
Garbage Pickup	
LP / Natural Gas	
TV / Internet / Phone	
Water	

Health and Lifestyle

Clothing	
Club Dues	
Dr / Hospital / Prescriptions	
Dry Cleaning	
Education	
Entertainment / Movies / Dinner	
Groceries	
Gym / Club Membership	
Home Improvements	
Lawn Service	
Newspaper	
Tithe/Charity	
Vacations	

Total Monthly Budget

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