

Personal Budget

	Per Month	Per Year
GROSS INCOME		
Employment Income/Salary	_____	_____
Employment Bonus or Production	_____	_____
Employment Profit share or Distribution	_____	_____
Interest and Dividends from Investments	_____	_____
Social Security Income	_____	_____
Retirement/Pension Income	_____	_____
Other Income _____	_____	_____
Total Income	-	-

EXPENSES, SAVINGS, and TAXES		
Home/Residence		
Mortgage or Rent	_____	_____
Property Taxes	_____	_____
HOA Dues & Assessments	_____	_____
Homeowners/Renters Insurance	_____	_____
Mortgage Insurance	_____	_____
Repairs/Maintenance	_____	_____
Maid/Homecare Service	_____	_____
Other Payments (2nd mtg, LOC, etc)	_____	_____
Utilities		
Oil	_____	_____
Gas	_____	_____
Electricity	_____	_____
Telephone	_____	_____
Water	_____	_____
Television/Cable	_____	_____
Internet	_____	_____
Other _____	_____	_____
Other Household		
Food/Groceries	_____	_____
Clothing/Apparel	_____	_____
Laundry & Dry Cleaning	_____	_____
Mobile Phone	_____	_____
Pet Care	_____	_____

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Offsite Storage unit	_____	_____
Incidentals	_____	_____
Other _____	_____	_____
Transportation		
Auto Payments	_____	_____
Gas & Fuel	_____	_____
Repairs & Maintenance	_____	_____
Auto Insurance	_____	_____
Registration & License	_____	_____
Bus/train passes	_____	_____
Other (parking, taxi, etc) _____	_____	_____
Recreation		
Entertainment	_____	_____
Club/Gym membership	_____	_____
Travel/Vacation	_____	_____
Other _____	_____	_____
Medical & Dental		
Doctors	_____	_____
Dentists	_____	_____
Medication & prescriptions	_____	_____
Other _____	_____	_____
Donations & Contributions		
Religious	_____	_____
Charity	_____	_____
Other _____	_____	_____
Miscellaneous		
Personal Grooming	_____	_____
Gifts (Birthdays, Christmas, etc)	_____	_____
Education & Self-improvement	_____	_____
Unreimbursed Business Expenses	_____	_____
Loans/Debt payments (education, personal, etc)	_____	_____
Other _____	_____	_____
Savings, Insurance, Investments		
Medical Insurance premiums	_____	_____
Disability Income Insurance	_____	_____
Life Insurance	_____	_____
Pension/Retirement plan contribution	_____	_____
Savings (monthly contributions)	_____	_____

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	Per Month	Per Year
Investments (monthly contributions)	_____	_____
Education Savings	_____	_____
Other _____	_____	_____
Taxes		
Social Security Tax	_____	_____
Federal Income Tax	_____	_____
State Income Tax	_____	_____
Self-employment Tax	_____	_____
Other _____	_____	_____
Other Expenses		
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Total Expenses, Savings & Taxes	- =====	- =====
RESIDUAL INCOME or LOSS	- []	- []