

## Financial Planning Process

# BUDGET WORKSHEET

Month & Year

HOUSING	EXPECTED	ACTUAL
Mortgage/Rent		
Electricity		
Natural Gas/Propane		
Internet		
Cable/Satellite		
Water		
Trash		
Maintenance		
HOA		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

LIVING EXPENSES	EXPECTED	ACTUAL
Groceries		
Household Goods		
Cell Phone		
Clothing		
Pet Care		
Personal Services (hair, dry cleaning)		
Childcare		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

AUTO EXPENSES	EXPECTED	ACTUAL
Car Payment		
Gasoline		
Tolls		
Maintenance		
Replacement Savings		
Car Insurance		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

MEDICAL/HEALTH	EXPECTED	ACTUAL
Doctors Visits		
Prescriptions		
Eyecare		
Dental		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

MISCELLANEOUS	EXPECTED	ACTUAL
Gym/Club Memberships		
Entertainment		
Subscriptions		
Travel (monthly savings)		
Tithe		
Gifts/Offering		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

INSURANCE EXPENSES	EXPECTED	ACTUAL
Health		
Homeowner's/Renter's		
Life		
Identity Theft		
Long-Term Care		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

DEBT	EXPECTED	ACTUAL
Credit Card 1		
Credit Card 2		
Credit Card 3		
Personal Loan		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

MONTHLY INCOME		MONTHLY EXPENSES		MONTHLY SAVINGS	
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