



Monthly

SPENDING SUMMARY

Step 1

FOR:

Step 2

 **TODAY'S DATE**

Step 3

*****PRINT OUT YOUR MOST RECENT BANK STATEMENTS. ALL ACCOUNTS.**

Step 4

☰ TYPES OF INCOME TOTAL UP EACH TYPE OF INCOME ON YOUR BANK STATEMENT.

PAYCHECKS	BRIDGES	SSI	OTHER
\$	\$	\$	\$

Step 5



TYPES OF EXPENSES

TOTAL UP EACH TYPE OF EXPENSE ON YOUR BANK STATEMENT.

HOUSING HOME SERVICES, UTILITIES, HOUSEHOLD ITEMS	FOOD GROCERIES	FOOD EATING OUT/FAST FOOD/COFFEES	TRANSPORTATION COSTS OF GETTING AROUND TOWN	HEALTH MEDICAL, HEALTH, PERSONAL CARE, INSURANCE	KIDS ANY KID-RELATED EXPENSES
\$	\$	\$	\$	\$	\$

Step 5



TYPES OF EXPENSES

TOTAL UP EACH TYPE OF EXPENSE ON YOUR BANK STATEMENT.

HOUSING HOME SERVICES, UTILITIES, HOUSEHOLD ITEMS	FOOD GROCERIES	FOOD EATING OUT/FAST FOOD/COFFEES	TRANSPORTATION COSTS OF GETTING AROUND TOWN	HEALTH MEDICAL, HEALTH, PERSONAL CARE, INSURANCE	KIDS ANY KID-RELATED EXPENSES
\$	\$	\$	\$	\$	\$

Step 5 (cont.)

☰ **TYPES OF EXPENSES** TOTAL UP EACH TYPE OF EXPENSE ON YOUR BANK STATEMENT.

PERSONAL RECREATION SPENDING, SUBSCRIPTIONS, TRAVEL	CLOTHING ALL TYPES	GIVING TITHE, CHARITABLE GIVING	GIVING GIFTS FOR FRIENDS/ FAMILY	FINANCIAL LEGAL AND PROFESSIONAL FEES	NET WORTH SAVINGS, INVESTING, DEBT PAYMENTS
\$	\$	\$	\$	\$	\$

Step 5 (cont.)

☰ **TYPES OF EXPENSES** TOTAL UP EACH TYPE OF EXPENSE ON YOUR BANK STATEMENT.

PERSONAL RECREATION SPENDING, SUBSCRIPTIONS, TRAVEL	CLOTHING ALL TYPES	GIVING TITHE, CHARITABLE GIVING	GIVING GIFTS FOR FRIENDS/ FAMILY	FINANCIAL LEGAL AND PROFESSIONAL FEES	NET WORTH SAVINGS, INVESTING, DEBT PAYMENTS
\$	\$	\$	\$	\$	\$

Step 5 (cont.)

☰ **TYPES OF EXPENSES** TOTAL UP EACH TYPE OF EXPENSE ON YOUR BANK STATEMENT.

BANK FEES		ATM WITHDRAWALS		MISC	MISC	MISC	MISC
				-----	-----	-----	-----
\$		\$		\$		\$	

Step 5 (cont.)

- _____
- _____
- _____

☰ TYPES OF EXPENSES

TOTAL UP EACH TYPE OF EXPENSE ON YOUR BANK STATEMENT.

[illegible]

Step 6



SUMMARY

TOTAL INCOME	TOTAL EXPENSES	TOTAL DEFICIT/SAVINGS
\$	\$	\$



IMPORTANT NOTES