

\* Include ALL expenses and utilize 'other' field if necessary

## Personal Monthly or Annual Budget

PROJECTED MONTHLY or ANNUAL INCOME	
Wages/Salaries	
Social Security	
Investment Income	
Other	
<b>Total income</b>	

Housing	Monthly or Annual Expense
Mortgage or Rent	
Phone	
Electricity	
Gas	
Water and sewer	
Cable	
Waste Removal	
Maintenance or repairs	
Supplies	
Other	
<b>Total</b>	

Transportation	Monthly or Annual Expense
Vehicle Payment	
Bus/taxi fare	
Insurance	
Licensing & Registration	
Fuel	
Maintenance	
Other	
<b>Total</b>	

Insurance	Monthly or Annual Expense
Home	
Health	
Life	
Other	
<b>Total</b>	

Food	Monthly or Annual Expense
Groceries	
Dining out	
Other	
<b>Total</b>	

Pets	Monthly or Annual Expense
Food	
Medical	
Grooming	
Other	
<b>Total</b>	

Personal	Monthly or Annual Expense
Medical	
Hair/nails	
Clothing	
Dry Cleaning	
Retirement Community Fees	
Organization dues or fees	
Other	
<b>Total</b>	

Name:	
Date Prepared:	

Children or Parents	Monthly or Annual Expense
Medical	
Clothing	
School Tuition / Supplies	
Organization dues or fees	
Child Care	
Other	
<b>Total</b>	

Entertainment	Monthly or Annual Expense
Movies	
Concerts	
Sporting events	
Other	
<b>Total</b>	

Vacation or Travel	Monthly or Annual Expense
Airplane/ Gas/ Rental car	
Lodging	
Eating out	
Excursions	
Other	
<b>Total</b>	

Loans	Monthly or Annual Expense
Personal	
Student	
Credit Card	
Other	
<b>Total</b>	

Taxes	Monthly or Annual Expense
Federal	
State	
Local	
Other	
<b>Total</b>	

Savings or Investments	Monthly or Annual Expense
Retirement Account	
Investment Account	
Other	
<b>Total</b>	

Gifts and Donations	Monthly or Annual Expense
Charity 1	
Charity 2	
<b>Total</b>	

Legal	Monthly or Annual Expense
Attorney	
Alimony	
Other	
<b>Total</b>	

<b>Monthly or Annual Income</b>	
<b>Monthly or Annual Expenses</b>	
<b>Monthly or Annual Cash Flow</b>	