

Monthly Budget Worksheet

House	Monthly Amount
Mortgage Principal & Interest	
Real Estate Taxes	
Rent	
Insurance – Home/Rental	
Maintenance – Supplies	
Utilities – Electric/Gas	
Water – Sewer	
Cable – Phone – Internet	
House Cleaning	
Other	
Total	

Daily Living	Monthly Amount
Groceries	
Dining – Eating Out	
Clothing	
Salon – Massage – Manicure	
Other	
Total	

Entertainment	Monthly Amount
Home – Shows – Events	
Sports – Hobbies – Lessons	
Dues – Memberships	
Vacation – Travel	
Other	
Total	

Transportation	Monthly Amount
Auto Loans	
Auto Insurance	
Fuel	
Repairs	
Other	
Total	

Health	Monthly Amount
Health Insurance	
Life Insurance	
LTC Insurance	
Disability Insurance	
Medicine – Drugs	
Veterinarian - Pet Care	
Other	
Total	

Debts, Loans	Monthly Amount
Credit Cards	
Student Loans	
Alimony - Child Support	
Other	
Total	

Charity, Gifts	Monthly Amount
Charitable Donations	
Gifts	
Other	
Total	

30818

Client Initials _____

Client Initials _____

Agent Initials _____

Date _____