



# Budget Worksheet

## PERSONAL AND FAMILY EXPENSES

Category	Monthly Budget	
	Current	Retirement
Alimony		
Bank Charges		
Books/Magazine		
Business Expense		
Care for Parent/Other		
Cash - Miscellaneous		
Cell Phone		
Charitable Donations		
Child Activities		
Child Allowance/Expense		
Child Care		
Child Support		
Child Tutor		
Clothing - Client		
Clothing - Co-Client		
Clothing - Children		
Club Dues		
Credit Card Debt Payment		
Dining		
Education		
Entertainment		
Gifts		
Groceries		
Healthcare - Dental		
Healthcare - Medical		
Healthcare - Prescription		
Healthcare - Vision		
Hobbies		
Household Items		
Laundry/Dry Cleaning		
Personal Care		
Personal Loan Payment		
Pet Care		
Public Transportation		
Recreation		
Self Improvement		
Student Loan Payment		
Vacation/Travel		
Other		
<b>Subtotal</b>	<b>\$ -</b>	<b>\$ -</b>

## VEHICLE EXPENSES

Category	Monthly Budget
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Client Name
Date Prepared

## PERSONAL INSURANCE EXPENSES

Category	Monthly Budget	
	Current	Retirement
Disability for Client		
Disability for Co-Client		
Life for Client		
Life for Co-Client		
LTC for Client		
LTC for Co-Client		
Medical for Client		
Medical for Co-Client		
Umbrella Liability		
Other		
<b>Subtotal</b>	<b>\$ -</b>	<b>\$ -</b>

## HOME EXPENSES

Category	Monthly Budget	
	Current	Retirement
First Mortgage		
Second Mortgage		
Equity Line		
Real Estate Tax		
Rent		
Homeowner's Insurance		
Association Fees		
Electricity		
Gas/Oil		
Trash Pickup		
Water/Sewer		
Cable/Satellite TV		
Internet		
Telephone (land line)		
Lawn Care		
Maintenance - Major Repair		
Maintenance - Regular		
Furniture		
Household Help		
Other		
<b>Subtotal</b>	<b>\$ -</b>	<b>\$ -</b>

## INCOME

Category	Monthly Budget
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Category	Current	Retirement
Loan Payment		
Lease Payment		
Insurance		
Personal Property Tax		
Fuel		
Repairs/Maintenance		
Parking/Tolls		
Docking/Storage		
Other		
<b>Subtotal</b>	<b>\$ -</b>	<b>\$ -</b>

**TAXES**

Category	Monthly Budget Amount	
	Current	Retirement
Client FICA		
Client Medicare		
Co-Client FICA		
Co-Client Medicare		
Federal Income		
State Income		
Local Income		
Other		
<b>Subtotal</b>	<b>\$ -</b>	<b>\$ -</b>

Category	Current	Retirement
Employment		
Other		
Other 2		
<b>Subtotal</b>	<b>\$ -</b>	<b>\$ -</b>

**SUMMARY**

Category	Current	Retirement
<b>Income</b>	<b>\$ -</b>	<b>\$ -</b>
Personal and Family Expenses	\$ -	\$ -
Vehicle Expenses	\$ -	\$ -
Taxes	\$ -	\$ -
Personal Insurance	\$ -	\$ -
Home Expenses	\$ -	\$ -
<b>Total Expenses</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Remaining Income</b>	<b>\$ -</b>	<b>\$ -</b>

*Please save, print, and return a copy to MGFS.*