



# WHITSELL

Financial Partners

## My Budget Worksheet

Name(s): \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/20\_\_\_\_

### Gross Income (Lines refer to Form 1014)

	Investor 1	Investor 2	Annual
Wages, Salary and Tips (line 7)	\$	\$	\$
Self-employment (line 12)	\$	\$	\$
<b>Earned Income Subtotal</b>	\$	\$	\$
Dividends and Capital Gains (line 9a)	\$	\$	\$
Interest (line 8a + line 8b)	\$	\$	\$
IRA Distributions (line 15a)	\$	\$	\$
<b>Investment Income Subtotal (not reinvested)</b>	\$	\$	\$
Alimony (line 11)	\$	\$	\$
Pensions / Annuities (line 16a)	\$	\$	\$
Rental Real Estate, Partnerships, Trust (line 17)	\$	\$	\$
Social Security (line 20a)	\$	\$	\$
Other income (line 21)	\$	\$	\$
<b>Other Income Not Subject to FICA Subtotal</b>	\$	\$	\$
<b>Subtotal</b>	\$	\$	\$

Justin Whitsell is registered with and securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Western Wealth Management, a registered investment advisor. Whitsell Financial Partners and Western Wealth Management are separate entities from LPL Financial.

Living Expenses		
	Monthly	Annual
General	\$	\$
Mortgage / Rent	\$	\$
Homeowner's / Renter's Insurance	\$	\$
Health & Dental Insurance	\$	\$
Auto Insurance (Licenses)	\$	\$
Property Taxes (Real Estate / Vehicle)	\$	\$
Home Repairs / Maintenance	\$	\$
Utilities (Gas / Electric / Phone / Water/ Garbage)	\$	\$
Groceries	\$	\$
Personal Goods (Toiletries / Dry Cleaning / Housekeeping)	\$	\$
Entertainment (Dining Out / Travel / Vacation)	\$	\$
Clothing	\$	\$
Gifts (Birthday / Holiday / Special Occasion)	\$	\$
Transportation (Gas / Taxis, Uber Lyft / Maintenance / Parking)	\$	\$
Charitable Contributions	\$	\$
Child Care (Lessons / Sports / Alimony)	\$	\$
<b>Subtotal</b>	\$	\$

Debts	Responsible Party	Balance	Monthly Payments (Principal and Interest Only)	Interest Rate	Bank
Primary Residence		\$	\$	%	
Home Equity		\$	\$	%	
Other Mortgage		\$	\$	%	
Real Estate / Business		\$	\$	%	
Credit Card		\$	\$	%	
Credit Card		\$	\$	%	
Automobile		\$	\$	%	
Automobile		\$	\$	%	
<b>Subtotal</b>		\$	\$		
<b>Annual Total</b>		\$	\$		

Life Insurance	Insurer Name	Owner	Beneficiary	Death Benefit	Cash Value	Annual Premium
Term				\$	\$	\$
Group (Work)				\$	\$	\$
Other				\$	\$	\$
<b>Subtotal</b>				\$	\$	\$

Taxes	Annual
Federal (line 61 on 1040)	
State / Local (line 5a on 1040 Schedule A)	
Social Security (Add boxes 4 and 6 on W-2 and Line 57 on 1040)	
<b>Subtotal</b>	

Current Financial Commitments	Monthly	Or	Annual
	Investor 1	Investor 2	
Retirement Plan Balances*			
Personal Contribution			
Employer Contribution			
Retirement (taxable) Contribution			
Education Plan Balances**			
Personal Contributions			

\*Refers to your employers 401(k), 403 (b), SEP IRA, SIMPLE IRA, etc...

\*\* Refers to 529 Plans, UTMA/UGMA, Coverdell Plans



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