



Budgeting Worksheet

Name: _____ Date: _____ Page 1 of 2

Description	Monthly Amount or	Annual Amount or	Amount Occurring Once A Year (Name Of Month & Amount)	Comments Deductible
Automobile				
Car (Lease) Payment	\$	\$	\$	
Gas	\$	\$	\$	
Insurance	\$	\$	\$	
Parking, Tolls	\$	\$	\$	
Car Registration	\$	\$	\$	
Maintenance	\$	\$	\$	
	\$	\$	\$	
Other Household				
Cable TV	\$	\$	\$	
Telephone / Cell	\$	\$	\$	
Internet	\$	\$	\$	
	\$	\$	\$	
Miscellaneous				
Accounting/Tax Prep	\$	\$	\$	
Alimony Payments	\$	\$	\$	
Subscription Fees	\$	\$	\$	
Education	\$	\$	\$	
Entertainment, Clubs	\$	\$	\$	
Safe Deposit Box	\$	\$	\$	
Gifts, Flowers	\$	\$	\$	
Hobbies	\$	\$	\$	
Home Computer	\$	\$	\$	
Life Insurance	\$	\$	\$	
Legal Fees	\$	\$	\$	
Non-Ded. Business Exp.	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	

So that we may help you meet your financial goals, we need to estimate your annual expenses. We have divided many of these expenses into categories. For those items that apply to you, please fill in either Column 1, 2, or 3.

For example, if you know the monthly amount, fill in Column 1. Or, if you know the annual amount, fill in Column 2. Or, if the expense occurs only once a year, fill in the month and the amount in Column 3. It is okay to switch from column to column for different items.

For example, you may spend \$100 per month on Gas. You may enter either \$100 in Column 1 or \$1200 in Column 2. If you spend \$3000 for an August vacation, write "August - \$3000" in Column 3.

