

# CLIENT BUDGET WORKSHEET

## CLIENT

NAME:

## CO-CLIENT

NAME:

### PERSONAL & FAMILY EXPENSES

CATEGORY	MONTHLY BUDGET	
	CURRENT	RETIREMENT
Alimony	\$	\$
Bank Charges	\$	\$
Books/Magazines	\$	\$
Business Expense	\$	\$
Care for Parent/Other	\$	\$
Cash - Misc.	\$	\$
Cell Phone	\$	\$
Charitable Donations	\$	\$
Child Activities	\$	\$
Child Allowance	\$	\$
Child Care	\$	\$
Child Support	\$	\$
Clothing - Client	\$	\$
Clothing - Co-Client	\$	\$
Clothing - Children	\$	\$
Club Dues	\$	\$
Credit Card Debt	\$	\$
Dining	\$	\$
Education	\$	\$

CATEGORY	MONTHLY BUDGET	
	CURRENT	RETIREMENT
Entertainment	\$	\$
Gifts	\$	\$
Groceries	\$	\$
Healthcare - Dental	\$	\$
Healthcare - Medical	\$	\$
Healthcare - Vision	\$	\$
Prescriptions	\$	\$
Hobbies	\$	\$
Household Items	\$	\$
Personal Care	\$	\$
Personal Loan Pymt	\$	\$
Pet Care	\$	\$
Public Transportation	\$	\$
Recreation	\$	\$
Self Improvement	\$	\$
Student Loan Pymt	\$	\$
Vacation/Travel	\$	\$
Other:	\$	\$
Other:	\$	\$

### INCOME

CATEGORY	MONTHLY BUDGET	
	CURRENT	RETIREMENT
Employment	\$	\$
Social Security	\$	\$
Pension	\$	\$
Other:	\$	\$

### INSURANCE

CATEGORY	MONTHLY BUDGET	
	CURRENT	RETIREMENT
Life for Client	\$	\$
Life for Co-Client	\$	\$
Long-Term Care (Client)	\$	\$
Long-Term Care (Co)	\$	\$
Medical for Client	\$	\$
Medical for Co-Client	\$	\$
Umbrella Liability	\$	\$
Other:	\$	\$

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### TAXES

CATEGORY	MONTHLY BUDGET	
	CURRENT	RETIREMENT
Client FICA	\$	\$
Client Medicare	\$	\$
Co-Client FICA	\$	\$
Co-Client Medicare	\$	\$
Federal Income	\$	\$
State Income	\$	\$
Local Income	\$	\$
Other:	\$	\$
Umbrella Liability	\$	\$
Other:	\$	\$

### VEHICLE EXPENSES (CLIENT)

CATEGORY	MONTHLY BUDGET	
	CURRENT	RETIREMENT
Loan Payment	\$	\$
Lease Payment	\$	\$
Insurance	\$	\$
Personal Property Tax	\$	\$
Fuel	\$	\$
Repairs/Maintenance	\$	\$
Parking/Tolls	\$	\$
Docking/Storage	\$	\$
Other:	\$	\$

### HOME EXPENSES

CATEGORY	MONTHLY BUDGET	
	CURRENT	RETIREMENT
First Mortgage	\$	\$
Second Mortgage	\$	\$
Equity Line	\$	\$
Real Estate Tax	\$	\$
Rent	\$	\$
Homeowner's Ins.	\$	\$
Association Fees	\$	\$
Electricity	\$	\$
Gas/Oil	\$	\$
Trash Pickup	\$	\$
Water/Sewer	\$	\$
TV/Streaming	\$	\$
Internet	\$	\$
Telephone (Landline)	\$	\$
Lawn Care	\$	\$
Maintenance - Major	\$	\$
Maintenance - Reg	\$	\$
Furniture	\$	\$
Household Help	\$	\$

### VEHICLE EXPENSES (CO-CLIENT)

CATEGORY	MONTHLY BUDGET	
	CURRENT	RETIREMENT
Loan Payment	\$	\$
Lease Payment	\$	\$
Insurance	\$	\$
Personal Property Tax	\$	\$
Fuel	\$	\$
Repairs/Maintenance	\$	\$
Parking/Tolls	\$	\$
Docking/Storage	\$	\$
Other:	\$	\$