

# Budget Worksheet

SOURCES OF INCOME	MONTHLY AMOUNT	ANNUAL AMOUNT
<b>Salary</b>	\$	\$
Your Primary Job	\$	\$
Spouse's Primary Job	\$	\$
Part-time Work	\$	\$
<b>Investments</b>	\$	\$
Interest and Dividends	\$	\$
Property	\$	\$
Other (alimony, Social Security)	\$	\$
<b>TOTAL</b>	\$	=

EXPENSES	MONTHLY	ANNUAL	SPENDING PLAN	
			% Reduction	\$ Saved
<b>Fixed</b>				
Housing (rent, mortgage)	\$	\$		
Utilities	\$	\$		
Insurance	\$	\$		
Loan Repayments	\$	\$		
<b>Variable</b>				
Food	\$	\$		
Clothing	\$	\$		
Credit card charges	\$	\$		
Transportation	\$	\$		
Leisure	\$	\$		
Travel	\$	\$		
Taxes	\$	\$		
Miscellaneous (gifts, snacks)	\$	\$		
<b>TOTAL</b>	= \$	\$		\$

INCOME vs. EXPENSES	MONTHLY	ANNUAL
Total income	\$	\$
Total expenses	- \$	- \$
<b>BUDGET SURPLUS OR SHORTFALL</b>	=	=