

Your Detailed Budget



This detailed worksheet can help you document both regular expenditures and ones that may arise unexpectedly. Completing this worksheet can help you budget for expenses and reduce the chance of excess or unanticipated expenses.

Client: _____ Co-Client: _____

Determine your basic living expenses.

HOME EXPENSES	
Category	Monthly Budget
Mortgage	\$
Equity Line	\$
Real Estate	\$
Rent	\$
Homeowners Insurance	\$
Association Fees	\$
Electricity	\$
Gas/Oil	\$
Trash Pickup	\$
Water/Sewer	\$
Cable/Satellite TV	\$
Internet	\$
Maintenance	\$
Other	\$
Subtotal	\$

VEHICLE EXPENSES	
Category	Monthly Budget
Loan Payment	\$
Lease Payment	\$
Insurance	\$
Fuel	\$
Repairs/Maintenance	\$
Parking/Tolls	\$
Docking/Storage	\$
Other	\$
Subtotal	\$

Determine your basic living expenses. (Continued)

PERSONAL EXPENSES	
Category	Monthly Budget
Alimony	\$
Business Expenses	\$
Care for Parent/Other	\$
Child Care/Expenses	\$
Credit Card Debt Payment	\$
Groceries	\$
Healthcare Dental	\$
Healthcare Medical	\$
Healthcare Prescription	\$
Healthcare Vision	\$
Household Items	\$
Laundry/Dry Cleaning	\$
Personal Care	\$
Personal Loan Payment	\$
Pet Care	\$
Cell Phone	\$
Public Transportation	\$
Student Loan Payments	\$
Miscellaneous	\$
Other	\$
Subtotal	\$

Determine your basic living expenses. (Continued)

PERSONAL INSURANCE EXPENSES	
Category	Monthly Budget
Umbrella	\$
Disability	\$
Life	\$
Long Term Care	\$
Medicare	\$
Other	\$
Subtotal	\$

Determine your extra living expenses. These are your more discretionary expenses.

HOME EXPENSES	
Category	Monthly Budget
Books/Magazine Subscriptions	\$
Charitable Donations	\$
Clothing	\$
Club Dues	\$
Dining	\$
Entertainment	\$
Furniture	\$
Gifts	\$
Hobbies	\$
Household Help	\$
Lawn Care	\$
Vacation/Travel	\$
Subtotal	\$

