



Plan Well, Retire Well, Live Well

## Monthly Budget Worksheet

HOUSE	MONTHLY AMOUNT
Mortgage Principal & Interest	\$ _____
Real Estate Taxes	\$ _____
Rent	\$ _____
Insurance - Home/Rental	\$ _____
Maintenance - Supplies	\$ _____
Utilities - Electric/Gas	\$ _____
Water - Sewer	\$ _____
Cable - Phone - Internet	\$ _____
House Cleaning	\$ _____
Other	\$ _____
<b>total</b>	<b>\$ _____</b>

TRANSPORTATION	MONTHLY AMOUNT
Auto Loans	\$ _____
Auto Insurance	\$ _____
Fuel	\$ _____
Repairs	\$ _____
Other	\$ _____
<b>total</b>	<b>\$ _____</b>

HEALTH	MONTHLY AMOUNT
Health Insurance	\$ _____
Life Insurance	\$ _____
LTC Insurance	\$ _____
Disability Insurance	\$ _____
Medicine - Drugs	\$ _____
Veterinarian - Pet Care	\$ _____
Other	\$ _____
<b>total</b>	<b>\$ _____</b>

DAILY LIVING	MONTHLY AMOUNT
Groceries	\$ _____
Dining - Eating Out	\$ _____
Clothing	\$ _____
Salon - Massage - Manicure	\$ _____
Other	\$ _____
<b>total</b>	<b>\$ _____</b>

DEBTS, LOANS	MONTHLY AMOUNT
Credit Cards	\$ _____
Student Loans	\$ _____
Alimony - Child Support	\$ _____
Other	\$ _____
<b>total</b>	<b>\$ _____</b>

ENTERTAINMENT	MONTHLY AMOUNT
Home - Shows - Events	\$ _____
Sports - Hobbies - Lessons	\$ _____
Dues - Memberships	\$ _____
Vacation - Travel	\$ _____
Other	\$ _____
<b>total</b>	<b>\$ _____</b>

**grand total** \$ \_\_\_\_\_