

# The Personal Budget Worksheet

Name: \_\_\_\_\_

Period covered - From: \_\_\_\_\_ To: \_\_\_\_\_

Item	Historical	Current Budget	Current Actual	Difference
<b>Debt, savings and investment</b>				
Credit and charge cards	\$ _____	\$ _____	\$ _____	\$ _____
Other installment loans	\$ _____	\$ _____	\$ _____	\$ _____
Education fund	\$ _____	\$ _____	\$ _____	\$ _____
Retirement	\$ _____	\$ _____	\$ _____	\$ _____
Other savings goals	\$ _____	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total debt, savings, etc.:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Food</b>				
Home consumption	\$ _____	\$ _____	\$ _____	\$ _____
Outside the home	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total food:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Clothing</b>				
Clothing and shoes	\$ _____	\$ _____	\$ _____	\$ _____
Cleaning, laundry	\$ _____	\$ _____	\$ _____	\$ _____
Jewelry, watches, etc.	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total clothing:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Housing</b>				
Rent or mortgage	\$ _____	\$ _____	\$ _____	\$ _____
Real estate taxes	\$ _____	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____	\$ _____
Furniture and furnishings	\$ _____	\$ _____	\$ _____	\$ _____
Appliances	\$ _____	\$ _____	\$ _____	\$ _____
Cleaning, repairs and maint.	\$ _____	\$ _____	\$ _____	\$ _____
Electricity, gas and heating	\$ _____	\$ _____	\$ _____	\$ _____
Water and sewer	\$ _____	\$ _____	\$ _____	\$ _____
Telephone, cable	\$ _____	\$ _____	\$ _____	\$ _____
Other housing	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total housing:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Totals for this page:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>

# The Personal Budget Worksheet

Name: \_\_\_\_\_

Period covered - From: \_\_\_\_\_ To: \_\_\_\_\_

Item	Historical	Current Budget	Current Actual	Difference
<b>Personal and Legal</b>				
Personal care and toiletries	\$ _____	\$ _____	\$ _____	\$ _____
Child care	\$ _____	\$ _____	\$ _____	\$ _____
Legal and accounting	\$ _____	\$ _____	\$ _____	\$ _____
Life and disability insurance	\$ _____	\$ _____	\$ _____	\$ _____
Other personal and legal	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total personal and legal:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Medical</b>				
Medicines	\$ _____	\$ _____	\$ _____	\$ _____
Doctors, dentists and hospitals	\$ _____	\$ _____	\$ _____	\$ _____
Health insurance	\$ _____	\$ _____	\$ _____	\$ _____
Other medical	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total medical:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Transportation</b>				
Auto payments	\$ _____	\$ _____	\$ _____	\$ _____
Repairs and maintenance	\$ _____	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____	\$ _____
Gas, oil and tires	\$ _____	\$ _____	\$ _____	\$ _____
Public transportation	\$ _____	\$ _____	\$ _____	\$ _____
Other transportation	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total transportation:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Miscellaneous</b>				
Books, magazines and newspapers	\$ _____	\$ _____	\$ _____	\$ _____
Vacations	\$ _____	\$ _____	\$ _____	\$ _____
Entertainment and clubs	\$ _____	\$ _____	\$ _____	\$ _____
Charitable	\$ _____	\$ _____	\$ _____	\$ _____
Education	\$ _____	\$ _____	\$ _____	\$ _____
Other miscellaneous	\$ _____	\$ _____	\$ _____	\$ _____
<b>Total miscellaneous:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Totals for this page:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Totals from previous page:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Grand totals:</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>

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# Disclosure Notice

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