

Name: _____ Date: _____



Financial Coaching Corps Budget Worksheet

CATEGORY	CURRENT AMOUNT	ADD/ SUBTRACT	FINAL AMOUNT
SECTION A: INCOME			
Wages and Bonuses			
Child Support			
Interest Income			
Investment Income			
Pension			
Public Assistance			
SSI			
Social Security Disability Insurance			
Social Security Retirement			
Social Security Dependent/Survivors			
Veterans' Benefits			
Unemployment			
Other Income:			
Total Monthly Income			
SECTION B EXPENSES:			
HOME:			
Mortgage or Rent			
Homeowners/Renters Insurance			
Property Taxes			
Home Repairs/Maintenance/ Dues			
Home Improvements			
UTILITIES:			
Electricity			
Water and Sewer			
Natural Gas or Oil			
Telephone (Land Line, Cell)			
FOOD:			
Groceries			
Eating Out, Lunches, Snacks			
FAMILY OBLIGATIONS:			
Child Support/Alimony			
Day Care, Babysitting			
Education/Afterschool/Camp			
HEALTH AND MEDICAL:			
Insurance (medical, dental, vision)			
Out-of-Pocket Medical Expenses			
Fitness			
TRANSPORTATION:			
Public Transportation			
Car Payments			
Gasoline/Oil			

CATEGORY	CURRENT AMOUNT	ADD/ SUBTRACT	FINAL AMOUNT
Auto Repairs/Maintenance/Fees			
Auto Insurance			
Other (tolls, parking, taxi)			
DEBT PAYMENTS:			
Credit Cards			
Tax Lien			
Student Loans			
Other Loans			
Self-Employed Estimated Taxes			
ENTERTAINMENT/RECREATION:			
Cable TV/Videos/Movies			
Computer Expense (Internet)			
Hobbies			
Subscriptions and Dues			
Vacations			
PETS:			
Food			
Grooming, Boarding, Vet			
CLOTHING:			
Self and Spouse/Partner			
Child(ren)			
Laundry/Dry-cleaning			
MONTHLY INVESTMENTS AND SAVINGS CONTRIBUTIONS:			
401(K)or IRA			
Stocks/Bonds/Mutual Funds			
College Fund			
Savings			
Emergency Fund			
MISCELLANEOUS:			
Toiletries, Household Products			
Gifts/Donations			
Grooming (Hair, Make-up, Other)			
Miscellaneous Expense			
Other:			
Total Monthly Expenses			
SECTION C: MONTHLY TOTALS			
Total Monthly Income (Section A)			
Total Monthly Expenses (Section B)			
Total Budget Surplus/Deficit (Total A minus Total B)			
Monthly Food Stamps Amount			