

Monthly Budget Planner

04/08

| HOUSEHOLD ITEMS | Client 1 or joint | Client 2 |
|--|-------------------|----------|
| Mortgage / Rent | £ | £ |
| Ground rent (if leasehold property) | £ | £ |
| Service charge (if leasehold property) | £ | £ |
| Council Tax | £ | £ |
| Water Rates | £ | £ |
| Gas, Electric and/or Fuel Oil total | £ | £ |
| Mobile Telephone | £ | £ |
| Home Telephone | £ | £ |
| Internet | £ | £ |
| TV package including Licence fee | £ | £ |
| Food shopping | £ | £ |
| Life insurance & other protection plans | £ | £ |
| Savings/Investment plans | £ | £ |
| Pension contributions | £ | £ |
| Building/contents insurance | £ | £ |
| Other (name type) | £ | £ |
| TRANSPORTATION | | |
| Fuel | £ | £ |
| Car Tax | £ | £ |
| Car insurance | £ | £ |
| Servicing and maintenance | £ | £ |
| Breakdown cover | £ | £ |
| Public Transport | £ | £ |
| Other (name type) | £ | £ |
| MISCELLANEOUS | | |
| Loans/HP/Rental agreements | £ | £ |
| Average monthly payment to Credit & Store Cards | £ | £ |
| Healthcare (dentist, medical care etc) | £ | £ |
| Newspapers / Subscriptions | £ | £ |
| Maintenance / Alimony | £ | £ |
| School Fees | £ | £ |
| Holidays | £ | £ |
| Clothing | £ | £ |
| Fun Money | £ | £ |
| Other (name type) | £ | £ |
| Total monthly expenditure (d): | £ | (e) £ |
| Total joint monthly expenditure (d + e) = (g): | £ | |
| Total joint monthly NET income: (h) | £ | |
| Total disposable income (h – g): | £ | |