

Personal Financial Budget Worksheet (Monthly/Annual Spending Plan)

	Monthly	Annual	% of Annual Total
Income			
Salary (Self & Other)	\$	\$	%
Investment Income			
Social Security Income			
Rental Income			
Other Income			
Total Income	\$	\$	100%
Expenses			
Donations			
Religious	\$	\$	%
Charitable			
Other Donations			
Savings & Investments			
Emergency Funds			
Other Savings			
Retirement Plans			
Stocks, Bonds, Mutual Funds			
Real Estate			
Annuities			
Income Taxes			
Insurance			
Life			
Health			
Disability			
Auto			
Homeowners			
Long Term Care			
Other Insurance			
Liabilities			
Mortgage/Rent			
Home Equity Loans/Line of Credit			
Real Estate Taxes			
Automobile Loan(s)			
Personal Loan(s)			
Credit Cards			
Other Liabilities			