

BUDGET PLANNER

Date _____

Client Name _____

Monthly Income		Comments	
	Client 1	Client 2	
Salary/ Wage (NET-after tax)			Total Income
Overtime, Bonuses and Commissions			Total Expenses
Business Income			Total Surplus Funds
Super Pension			
Income From Investments			
Rental Income			Comments
Family Trust Distributions			
Maintenance Payments			
Annuity Income			
Benefits e.g. Centrelink/ Pensions			
Work Compensation Payments			
Future Income e.g. Inheritance			
Other			
Total Monthly			
Total Yearly			
Joint Income Frequency			