

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	_____	_____	_____