



Current Income and Expenses

EARNINGS

Annual Salary _____
 Bonus, Commissions _____
 Interest, Dividends _____
 Rental Income _____

MONTHLY SAVINGS

IRA/Roth IRA _____
 Emergency _____
 Education _____
 Annuities/Life Policies _____

ESTIMATED MONTHLY EXPENSES

Food _____	Debt Payment _____
Clothing/Shoes _____	Misc/Cash _____
Utilities _____	Vacations _____
Cell Phone _____	Child Care _____
Pool/Lawn/House _____	Hair Maintenance _____
Rent/Mortgage _____	Dry Cleaning _____
HOA _____	Children's Allowance _____
Car Payment _____	Donations _____
Car Insurance _____	Gifts _____
Gas/Maintenance _____	Books/Subscriptions _____
Eating Out _____	Postage _____
Entertainment/Gifts _____	Books/Education _____
Medical Insurance _____	Hobbies _____
Prescriptions _____	Furniture/appliances _____
Dues _____	

TOTAL

Variable Expenses

Restaurants/Food _____
 Household Items _____
 Gas _____
 Entertainment _____
 Cosmetics, toiletries _____
 Wash car _____
 Beer, Wine _____
 Cigarettes _____
 Parking _____

TOTAL