Household Budget Worksheet

Long-term goals: _____

_____

Budget for the month of: _____

PART 1: INCOME

Annual Income (See line 22, Form 1040) _____
Taxes – _____
After-Tax Income = _____
Monthly Spendable Income = _____

PART 2: MONTHLY EXPENSES	Current Spending	Revisions	New Budget
Shelter			
Mortgage or Rent			
Insurance			
Property Taxes			
Home Maintenance			
Utilities			
Gas and Electric			
Water			
Telephone:			
Food			
Transportation			
Car Payments			
Insurance			
Gas & Oil			
Repairs & Maintenance			
Medical			
Clothing			
Debt			
Credit Card Payments			
Loan Payments			
Other Debt Payments			
Entertainment/Recreation			
Cable/Videos/Movies			
Sports & Hobbies			
Subscriptions			
Vacations			
Investments			
401(k) Investment			
Mutual Fund, Stocks, Bonds			
Annuity			
Children's College			
Savings Account			
Emergency Fund			
Miscellaneous Expenses			
Gifts			
Other			
Total Expenses & Investments			
Monthly Spendable Income			
Monthly Expenses & Investments	-	-	-
Surplus or Shortage	=	=	=

McLean Advisory Group
(609) 489-5200 • support@mtagllc.com

MCLEAN advisorygroup