



Budget Worksheet

On the road to financial success, creating a budget, and keeping it, can help you achieve your SMART financial goals. Use this worksheet to map out where your money is going each month and review it regularly to be sure you're on track.

EXPENSE CATEGORY	MONTHLY AMOUNT
HOUSING	
Mortgage	\$
Property Taxes	\$
Homeowners Insurance	\$
Rent	\$
Utilities	\$
Maintenance/Fees	\$
FOOD	
Groceries	\$
Dining Out	\$
TRANSPORTATION	
Car Payment	\$
Vehicle Maintenance	\$
Fuel	\$
Auto Insurance	\$
Taxes/Registration	\$
Public Transportation	\$
HEALTH CARE	
Health Insurance/Medicare/ Supplemental Insurance	\$
Out of Pocket Payments	\$
Dental	\$
Eye Doctor/Glasses	\$
Other Medical Services	\$
Medications and Supplies	\$

EXPENSE CATEGORY	MONTHLY AMOUNT
OTHER INSURANCE	
Personal Insurance	\$
Life Insurance	\$
Disability Insurance	\$
Long-term Care Insurance	\$
Other	\$
PERSONAL CARE	
Clothing	\$
Products and Services	\$
Family Care	\$
Alimony	\$
Child Care	\$
MISCELLANEOUS	
Loans/Credit Cards	\$
Entertainment	\$
Travel/Vacation	\$
Hobbies	\$
Gifts	\$
Education	\$
Charitable Donations	\$
Other	\$

TOTAL MONTHLY EXPENSES \$