

BUDGET WORKSHEET

YEAR	MONTHLY		ANNUAL		NOTES
INCOME	\$	-	\$	-	
SALARY					
BONUS					
SOCIAL SECURITY, PENSION, OR ANNUITY INCOME					
PORTFOLIO DISTRIBUTIONS					
OTHER INCOME (REAL ESTATE, DISABILITY, ALIMONY, UNEMPLOYEMENT, ETC.)					
HOUSEHOLD	\$	-	\$	-	
MORTGAGE (PRINCIPAL & INTEREST) OR RENT PAYMENT					
HOMEOWNER'S OR RENTERS INSURANCE					
PROPERTY TAXES					
UTILITIES (PHONE, CABLE, INTERNET, WATER, TRASH, ELECTRIC, ETC.)					
OTHER (IE., LANDSCAPING, PEST CONTROL, SECURITY SYSTEM, ETC.)					
PROPERTY TAXES AND HOA FEES, IF APPLICABLE					
HEALTHCARE COSTS	\$	-	\$	-	
INSURANCE PREMIUMS (MEDICAL, DENTAL, ETC.)					
OTHER COSTS (CO-PAYS, PRESCRIPTIONS, ETC.)					

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RECREATIONAL EXPENSES	\$	-	\$	-	
SHOPPING, ENTERTAINMENT, ETC.					
OTHER RECREATIONAL					
PERSONAL EXPENSES	\$	-	\$	-	
FOOD (GROCERIES, RESTAURANTS, ETC.)					
CHILDREN (CHILD CARE, ALLOWANCES, LESSONS, CAMPS, ETC.)					
OTHER PERSONAL (SALON, PET CARE, ETC.)					
GIFTS	\$	-	\$	-	
BIRTHDAY, HOLIDAY, CHARITY GIFTS					
OTHER GIFTS					
AUTOMOBILE EXPENSES	\$	-	\$	-	
CAR PAYMENT					
GASOLINE					
AUTO INSURANCE					
OTHER INSURANCE	\$	-	\$	-	
LIFE INSURANCE PREMIUMS					
OTHER INSURANCE PREMIUMS					
EDUCATION & TUITION	\$	-	\$	-	

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SAVINGS	\$	-	\$	-	
IRA/401(K)					
OTHER SAVINGS					
TAXES	\$	-	\$	-	
FEDERAL					
STATE					
NET SURPLUS/DEFICIT	\$	-	\$	-	

The accompanying Cash Flow, was prepared solely to help you develop your personal financial plan. Accordingly, it may be incomplete or contain other departures from generally accepted accounting principles and should not be used to obtain credit or for any other purposes other than developing your financial plan. We have not audited, reviewed, or compiled the statement.



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If you would like to have a confidential conversation and learn more about how **SignatureWOMEN** can possibly be of help, please reach out to **Jamie McCusker Gentry** at Jamie.Gentry@SignatureFD.com, **Victoria Shackley** at Vicki.Shackley@SignatureFD.com, or **Clara C. Parris** at Clara.Parris@SignatureFD.com.

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