

Snapshots

STARTING OUT MONTHLY BUDGET

Combined Net Monthly Income: Housing Mortgage/Rent Property Taxes Property Insurance Heat Hydro Water Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Housing Client Spouse Mortgage/Rent Property Taxes Property Insurance Heat Hydro Water Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Mortgage/Rent Property Taxes Property Insurance Heat Hydro Water Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Mortgage/Rent Property Taxes Property Insurance Heat Hydro Water Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Property Taxes Property Insurance Heat Hydro Water Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Property Insurance Heat Hydro Water Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Property Insurance Heat Hydro Water Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Hydro Water Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Water Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Property Maintenance Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Other Housing Cost Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Telephone (Home) Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Telephone (Cell) Cable Internet Other Food Groceries Restaurants
Cable Internet Other Food Groceries Restaurants
Internet Other Food Groceries Restaurants
Other Food Groceries Restaurants
Food Groceries Restaurants
Groceries Restaurants
Groceries Restaurants
Restaurants
Clothing
Clothing
Purchases
Cleaning
Transportation
Loan/Lease Payments
Insurance/Plates
Fuel
Parking
Maintenance
Other
Household Expenses
Improvement/Purchases
Classisselles
Cleaning/Help
Pets/Pet Care
Pets/Pet Care
Pets/Pet Care Total Monthly Expenses:

Personal Care	Client	Spouse
Medical		
Dental		
Vision		
Other		
Personal Insurance		
Life Insurance		
Disability Insurance		
Health Insurance		
Other		
Loan Payments		
Credit Cards		
Lines of Credit		
Investment Loans		
Student Loans		
Capital Accumulation		
Capital Accumulation Emergency Fund		
•		
Emergency Fund		
Emergency Fund Education Fund		
Emergency Fund Education Fund Retirement		
Emergency Fund Education Fund Retirement Other		
Emergency Fund Education Fund Retirement Other Lifestyle/Miscellaneous		
Emergency Fund Education Fund Retirement Other Lifestyle/Miscellaneous Donations		
Emergency Fund Education Fund Retirement Other Lifestyle/Miscellaneous Donations Personal Gifts		
Emergency Fund Education Fund Retirement Other Lifestyle/Miscellaneous Donations Personal Gifts Regular Vacations		
Emergency Fund Education Fund Retirement Other Lifestyle/Miscellaneous Donations Personal Gifts Regular Vacations Entertainment Recreation Subscriptions		
Emergency Fund Education Fund Retirement Other Lifestyle/Miscellaneous Donations Personal Gifts Regular Vacations Entertainment Recreation Subscriptions Cigarettes/Alcohol		
Emergency Fund Education Fund Retirement Other Lifestyle/Miscellaneous Donations Personal Gifts Regular Vacations Entertainment Recreation Subscriptions Cigarettes/Alcohol Personal Allowance		
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Emergency Fund Education Fund Retirement Other Lifestyle/Miscellaneous Donations Personal Gifts Regular Vacations Entertainment Recreation Subscriptions Cigarettes/Alcohol Personal Allowance		

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(surplus or deficit):