

BUDGET WORKSHEET

► **INCOME**

Annual Amount

Annual Income (After Taxes) _____

► **ESSENTIAL ANNUAL EXPENSES**

Contribution to Retirement Savings _____

Housing

Rent or Mortgage _____

Property Taxes and Insurance _____

Home and Appliance Maintenance _____

Utilities _____

Other _____

Necessities

Groceries _____

Health and Beauty Aids _____

Clothing _____

Laundry and Dry Cleaning _____

Health Care and Insurance

Health Insurance _____

Medicare Premiums _____

Dental and Vision Care _____

Other Uncovered Expenses _____

Life Insurance _____

Long-Term Care Insurance _____

Family Care

Long-Term Care for Parent _____

Assisted Living for Parent _____

Support for Children or Grandchildren _____

Other _____

Routine Transportation

Auto Loan or Lease Payment _____

Insurance _____

Maintenance, Excise Tax _____

Gasoline _____

Auto Club _____

Other _____

Miscellaneous

Sub-Total: Essential Annual Expenses

► **DISCRETIONARY ANNUAL EXPENSES**

Entertainment

Club Membership _____

Travel and Vacations _____

Hobbies _____

Continued Education _____

Other _____

Gifts and Charitable Contributions

Miscellaneous _____

Sub-Total: Discretionary Annual Expenses

TOTAL: ESSENTIAL ANNUAL EXPENSES + DISCRETIONARY ANNUAL EXPENSES =



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