

Budget Worksheet

		Current Monthly		Anticipated Monthly in Retirement	
Net Income:	Primary Income				
	Other Income				
	INCOME TOTAL:				
Expenses		Essential	Discretionary	Essential	Discretionary
Pay Yourself First	Short Term Goal:				
	Long Term Goal:				
	Other:				
Household	Mortgage/Rent/HOA Dues/Property Taxes				
	Homeowners/Renters Insurance				
	Home Repairs/Maintenance				
	Home Improvements				
	Utilities/Cable/Internet				
	Household Purchases				
Other:					
Food	Groceries				
	Restaurants				
Healthcare and Insurance	Medical Insurance/Medicare Premiums				
	Out-of-Pocket Medical Expenses				
	Medical Supplies/ Prescriptions				
	Vision				
	Dental				
	Life Insurance Premiums				
	LTC Premiums				
Other:					
Transportation	Car Payments				
	Auto Insurance				
	Taxes/Registration				
	Maintenance/Fuel				
	Public Transportation				
Personal	Clothing				
	Personal Care				
	Pet Care				
	Elder Care				
	Financial Assistance Children/Grandchildren				
	Gifts				
Other:					
Entertainment/ Recreation	Travel				
	Hobbies				
	Subscriptions/Memberships/Fitness				
	Other:				
Financial	Credit Card				
	Personal Loan				
	Student Loan				
	Retirement Plan Contributions				
	Charitable Contributions				
	Other:				
TOTAL	Total Expenses				
	Remaining Income Savings				