Spending Plan Worksheet

money mentors

LIVING EXPENSES	Monthly	Annually
Housing		
Rent/Mortgage		
2nd Mtge		
property taxes		
maintenance, other		
Lot Rent		
Household Incidentals		
alarm system		
rental property mortgage		
Utilities		
Power		
Natural Gas		
Water & Sewer		
Cell Phone		
Internet/Cable/Land line		
Food		
Incidentals		
Bank Service fees		
Laundry		
Subscriptions		
Insurance		
Life		
Home		
Vehicle		
Health		
Transportation		
gasoline		
vehicle maintenance		
vehicle license and registration	$ -	
Taxis/Buses		
parking		
Income Taxes		
Personal Allowances		
Alcohol/Cigarettes		
Lottery		
Movies,Coffees,Lunch outs		
Grooming, Haircuts, Manicures		
Medical Expenses		
Prescriptons		
Therapists		
Dentist/Vision		
Recreation		
Entertainment, Activities		
Sports, Fitness, Gym Memberships		
Contributions and Donations		
Other monthly expenses		
Pets		
Daycare		
OPD Fee		
Secured Creditor Payments		
Vehicle Loan		
Travel Trailer		
Furniture		
Savings		
Clothing		
	$ -	
	$ -	
	$ -	
	$ -	
Education	$ -	
Gifts and Festivities		
Christmas	$ -	
Other	$ -	
Travel and Vacations	$ -	
Total Monthly Expenses	$ -	
Total Irregular and Annual		$ -
Monthly Irregular and Annual	$ -	
TOTAL MONTHLY EXPENSES	$ -	

CLIENT:

DATE:

MONTHLY INCOME	
Income	
Spouse Income	
CTB/UCCB	
Rental Income	
GST	
TOTAL INCOME	$ -

Saving/Credit Payment Ability	
Total montly net income	$ -
Total monthly living expenses	$ -
Ability	**$ -**

SUMMARY Budget/Expenses	
Housing (less insurance)	$ -
Utilities	$ -
*Medical	$ -
Transportation (less license & registration)	$ -
*Insurance (Home/Vehicle/Life)	$ -
Secured Loans	$ -
Income Tax	$ -
Food	$ -
Incidentals	$ -
Recreation	$ -
Personal Allowance	$ -
Other Expenses	$ -
Total Annual Irregular per month	$ -
Total per month	**$ -**

DEBTS - names of creditors	$ owing	Min Monthly Pmt
Total	**$0.00**	**$0.00**
Approx OPD @ 4 years	**$0.00**	

Client notes: