

# MONTHLY BUDGET WORKSHEET

## Family Income

### PERSON 1

Salary/Wages   
Commissions/Bonuses   
Investment Income   
Retirement Income   
Other   
**TOTAL**

### PERSON 2

Salary/Wages   
Commissions/Bonuses   
Investment Income   
Retirement Income   
Other   
**TOTAL**

**TOTAL INCOME**

## Primary Goals

- 1
- 2
- 3
- 4

Family Income

Critical Expenses

Asset Protection

Lifestyle Expenses

Savings Rate

## 911 Fund

Months

- ☐ 1
- ☐ 3
- ☐ 6

## Asset Protection

Life Insurance  
 Disability Insurance  
 Long Term Care  
**TOTAL**

**TOTAL ASSET PROTECTION**

## Lifestyle Expenses

### DEBT

Credit Cards  
 Student Loans  
 Other  
**TOTAL**

### HOUSING

Cable/Internet  
 Phone  
 House Cleaning  
 Yard  
 Maintenance  
 Other  
**TOTAL**

### LIFESTYLE

Grooming  
 Entertainment  
 Vacations  
 Hobbies  
 Memberships/Gyms  
 Subscriptions  
 Clothing  
 Tithing/Charity  
 Dry Cleaning  
**TOTAL**

### FAMILY

"Fun Money"  
 Childcare  
 Education  
 Gifts  
 Pet Care  
 Cash Purchases  
**TOTAL**

**TOTAL LIFESTYLE EXPENSES**

## Critical Expenses

### HOUSING

Rent/Mortgage/HOA   
Taxes   
Insurance   
Utilities   
Other   
**TOTAL**

### TRANSPORTATION

Car Payment   
Registration & Insurance   
Fuel   
Public Transit   
Other   
**TOTAL**

### FOOD/MEDICAL

Food/Groceries   
Medications   
Insurances   
Other   
**TOTAL**

**TOTAL CRITICAL EXPENSES**

**trilogy**  
FINANCIAL