**Monthly Budget Worksheet**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | House | Monthly Amount | | Mortgage Principal & Interest | $ | | Real Estate Taxes | $ | | Rent | $ | | Insurance – Home/Rental | $ | | Maintenance – Supplies | $ | | Utilities – Electric/Gas | $ | | Water – Sewer | $ | | Cable – Phone – Internet | $ | | House Cleaning | $ | | Other | $ | | Total | $ | | |  |  | | --- | --- | | Transportation | Monthly Amount | | Auto Loans | $ | | Auto Insurance | $ | | Fuel | $ | | Repairs | $ | | Other | $ | | Total | $ | |
| |  |  | | --- | --- | | Health | Monthly Amount | | Health Insurance | $ | | Life Insurance | $ | | LTC Insurance | $ | | Disability Insurance | $ | | Medicine – Drugs | $ | | Veterinarian ‐ Pet Care | $ | | Other | $ | | Total | $ | |
| |  |  | | --- | --- | | Daily Living | Monthly Amount | | Groceries | $ | | Dining – Eating Out | $ | | Clothing | $ | | Salon – Massage – Manicure | $ | | Other | $ | | Total | $ | |
| |  |  | | --- | --- | | Debts, Loans | Monthly Amount | | Credit Cards | $ | | Student Loans | $ | | Alimony ‐ Child Support | $ | | Other | $ | | Total | $ | |
| |  |  | | --- | --- | | Entertainment | Monthly Amount | | Home – Shows – Events | $ | | Sports – Hobbies – Lessons | $ | | Dues – Memberships | $ | | Vacation – Travel | $ | | Other | $ | | Total | $ | |
| |  |  | | --- | --- | | Charity, Gifts | Monthly Amount | | Charitable Donations | $ | | Gifts | $ | | Other | $ | | Total | $ | |

24142 Securities and advisory services offered through **GWN Securities, Inc**. 11440 N Jog Road, Palm Beach Gardens, FL 33418 561-472-2700, Member FINRA, SIPC Buczkowski Insurance & Financial Services and **GWN Securities, Inc**. are not affiliated.

Client Initials \_\_\_\_\_\_\_\_\_\_ Client Initials\_\_\_\_\_\_\_\_\_\_ Agent Initials\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_