

Monthly Budget Worksheet

Client last name	Client first name
------------------	-------------------

Housing

Mortgage or rent	\$
Utilities (heat, hydro, water)	\$
Telephone	\$
Cable television / satellite	\$
Internet service	\$
Property taxes	\$
Insurance	\$
Maintenance / repairs	\$
Condominium fees	\$
Other	\$

Transportation

Car payment / lease	\$
Insurance	\$
Licence / registration	\$
Gas / oil / repairs	\$
Parking / taxi / bus	\$
Other	\$

Health

Health insurance	\$
Life insurance	\$
Prescription / non-prescription drugs	\$
Doctors / dentist / optometrist	\$
Long-term care services	\$
Other	\$

Living Expenses

Groceries	\$
Personal hygiene (haircuts, etc.)	\$
Clothing (purchase, cleaning)	\$
Alcohol / tobacco	\$
Other	\$

Entertainment

Dining out	\$
Movies / theatre	\$
Newspapers / magazines	\$
Sports activities / hobbies	\$
Travel / vacation	\$
Membership fees	\$
Tuition fees for continuing education	\$
Other	\$

Miscellaneous

Income tax	\$
Professional dues	\$
Dependant support	\$
Gifts	\$
Donations	\$
Savings	\$
Emergency fund	\$
Pet care	\$
Other	\$

Total Monthly Expenses	\$
-------------------------------	----

Net monthly income	\$
- Total monthly expenses	\$
= Available resources	\$