



Monthly Family Expense Budget

Liabilities	Amount
Mortgage Payment or Rent	
Real Estate Taxes	
Interest on mortgage	
Vacation Home Mortgage	
Taxes	
Interest	
Automobile Loan	
Personal Loans	
Charge Accounts	
Other	
Total Liabilities	

Income Taxes	
Federal	
State	
Local	
Total Taxes	

Social Security	
Client	
Spouse	
Total Social Security	

Civil Service	
Client	
Spouse	
Total Civil Service	

Other Benefit Plans	
Client	
Spouse	
Total Benefit Plans	

Transportation	
Gas and Oil	
Maintenance and Repair	
License	
Public Transportation	
Parking	
Total Transportation	

Insurance	Amount
Life Insurance	
Health Insurance	
Disability Income	
Auto Insurance	
Home Owners Insurance	
Other	
Total Insurance	

Savings and Investments	
Payroll Deductions	
Credit Union	
Mutual Funds	
Stocks and Bonds	
Real Estate	
Annuities	
Face Amount Certificates	
Other	
Total Savings and Investments	

Contributions	
Religious	
Charitable	
Subtotals	

Household Expenses	
Food	
Clothing	
Doctor (including eye care)	
Dentist	
Prescription Drugs	
Personal Care	
Gas and Electricity	
Maintenance, Repair & Garbage	
Home Furnishings	
Telephone	
Water	
Recreation, Entertainment & Hobbies	
Educ Expenses, Books & Magazines	
Vacation and Travel	
Children Allowances	
Gifts	
Miscellaneous	
Subtotals	

TOTAL MONTHLY BUDGET	
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