

The Personal Budget Worksheet

Name: _____

Period Covered – From: _____ To: _____

Item	Historical	Current Budget	Current Actual	Difference
Debt, Savings, and Investments				
Credit and charge cards	\$	\$	\$	\$
Other installment loans	\$	\$	\$	\$
Education fund	\$	\$	\$	\$
Retirement	\$	\$	\$	\$
Other savings goals	\$	\$	\$	\$
Other	\$	\$	\$	\$
Total Debt, Savings, and Investment:	\$	\$	\$	\$
Food				
Home consumption	\$	\$	\$	\$
Outside the home	\$	\$	\$	\$
Total Food:	\$	\$	\$	\$
Clothing				
Clothing and shoes	\$	\$	\$	\$
Cleaning, laundry	\$	\$	\$	\$
Jewelry, watches, etc.	\$	\$	\$	\$
Total Clothing:	\$	\$	\$	\$
Housing				
Rent or mortgage	\$	\$	\$	\$
Real estate taxes	\$	\$	\$	\$
Insurance	\$	\$	\$	\$
Furniture and furnishings	\$	\$	\$	\$
Appliances	\$	\$	\$	\$
Cleaning, repairs, and maint.				
Electricity, gas, and heating				
Water and sewer	\$	\$	\$	\$
Telephone, cable	\$	\$	\$	\$
Other housing	\$	\$	\$	\$
Total Housing:	\$	\$	\$	\$
Personal and Legal				
Personal care and toiletries	\$	\$	\$	\$
Child care	\$	\$	\$	\$
Legal and accounting	\$	\$	\$	\$
Life and disability insurance	\$	\$	\$	\$
Other personal and legal	\$	\$	\$	\$
Total Personal and Legal:	\$	\$	\$	\$
Totals for this page:				
	\$	\$	\$	\$

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Item	Historical	Current Budget	Current Actual	Difference
Medical				
Medicines	\$	\$	\$	\$
Doctors, dentists, and hospitals	\$	\$	\$	\$
Health insurance	\$	\$	\$	\$
Other medical	\$	\$	\$	\$
Total Medical:	\$	\$	\$	\$
Transportation				
Auto payments	\$	\$	\$	\$
Repairs and maintenance	\$	\$	\$	\$
Insurance	\$	\$	\$	\$
Gas, oil, and tires	\$	\$	\$	\$
Public transportation	\$	\$	\$	\$
Other transportation	\$	\$	\$	\$
Total Transportation:	\$	\$	\$	\$
Miscellaneous				
Books, magazines, and newspapers	\$	\$	\$	\$
Vacations	\$	\$	\$	\$
Entertainment and clubs	\$	\$	\$	\$
Charitable	\$	\$	\$	\$
Education	\$	\$	\$	\$
Other miscellaneous	\$	\$	\$	\$
Total Miscellaneous:	\$	\$	\$	\$
Totals for this page:	\$	\$	\$	\$
Totals from previous page:	\$	\$	\$	\$
Grand Totals:	\$	\$	\$	\$