



# The Personal Budget Worksheet

Name: \_\_\_\_\_

Period Covered – From: \_\_\_\_\_ To: \_\_\_\_\_

Item	Historical	Current Budget	Current Actual	Difference
<b>Debt, Savings, and Investments</b>				
Credit and charge cards	\$	\$	\$	\$
Other installment loans	\$	\$	\$	\$
Education fund	\$	\$	\$	\$
Retirement	\$	\$	\$	\$
Other savings goals	\$	\$	\$	\$
Other	\$	\$	\$	\$
<b>Total Debt, Savings, and Investment:</b>	\$	\$	\$	\$
<b>Food</b>				
Home consumption	\$	\$	\$	\$
Outside the home	\$	\$	\$	\$
<b>Total Food:</b>	\$	\$	\$	\$
<b>Clothing</b>				
Clothing and shoes	\$	\$	\$	\$
Cleaning, laundry	\$	\$	\$	\$
Jewelry, watches, etc.	\$	\$	\$	\$
<b>Total Clothing:</b>	\$	\$	\$	\$
<b>Housing</b>				
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	\$	\$	\$	\$
<b>Total Housing:</b>	\$	\$	\$	\$
<b>Personal and Legal</b>				
Personal care and toiletries	\$	\$	\$	\$
Child care	\$	\$	\$	\$
Legal and accounting	\$	\$	\$	\$
Life and disability insurance	\$	\$	\$	\$
Other personal and legal	\$	\$	\$	\$
<b>Total Personal and Legal:</b>	\$	\$	\$	\$
<b>Totals for this page:</b>				
	\$	\$	\$	\$

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Period Covered – From: \_\_\_\_\_ To: \_\_\_\_\_

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