

Monthly Budget Planner

Plan today for a more confident tomorrow.

Month:

Year:

Last Updated:

INCOME	Budgeted	Actual	Notes
Social Security			
Pension Income			
Annuity Income			
Retirement Account Withdrawals			
Employment / Part-Time Work			
Rental or Other Income			
Other Income			
TOTAL MONTHLY INCOME			

HOUSING	Budgeted	Actual	Notes
Mortgage or Rent			
Property Taxes			
Homeowners / Renters Insurance			
HOA Fees			
Home Maintenance / Repairs			
Other Housing Expenses			

UTILITIES & COMMUNICATIONS	Budgeted	Actual	Notes
Electricity			
Heating / Gas			
Water / Sewer			
Phone			
Internet / Cable			
Other Utilities			

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Track what you plan to spend and what you actually spend.

EVERYDAY LIVING	Budgeted	Actual	Notes
Groceries			
Dining Out			
Personal Care			
Household Items			
Clothing			
Other Everyday Expenses			

TRANSPORTATION	Budgeted	Actual	Notes
Car Payment(s)			
Auto Insurance			
Fuel / Gas			
Maintenance / Repairs			
Tolls / Parking			
Other Transportation			

HEALTHCARE & INSURANCE	Budgeted	Actual	Notes
Health Insurance / Medicare Premiums			
Prescriptions			
Medical / Dental / Vision			
Life Insurance			
Long-Term Care Insurance			
Other Healthcare Expenses			

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Review your month and make note of what you want to revisit.

LIFESTYLE & OTHER EXPENSES	Budgeted	Actual	Notes
Travel			
Entertainment / Hobbies			
Gifts / Family Support			
Charitable Giving			
Subscriptions / Memberships			
Pet Expenses			
Debt Payments			
Savings / Cash Reserves			
Other Expenses			

MONTHLY SUMMARY

Total Monthly Income	
Total Monthly Expenses	
Amount Remaining	

EXPENSES TO REVIEW

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☐	
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NOTES & NEXT STEPS

Questions, changes or reminders for next month.