

# *budget forms*



passion *for* savings

# quick start budget

INCOME 1 \_\_\_\_\_

INCOME 2 \_\_\_\_\_

TOTAL INCOME \_\_\_\_\_

## CHARITY

TITHES \_\_\_\_\_

GIVING \_\_\_\_\_

*total* \_\_\_\_\_

## SAVING

EMERGENCY FUND \_\_\_\_\_

OTHER \_\_\_\_\_

OTHER \_\_\_\_\_

*total* \_\_\_\_\_

## HOUSING

FIRST MORTGAGE / RENT \_\_\_\_\_

SECOND MORTGAGE \_\_\_\_\_

REAL ESTATE TAXES \_\_\_\_\_

REPAIRS / MAINTENANCE \_\_\_\_\_

HOMEOWNER / RENTER INSURANCE \_\_\_\_\_

*Total* \_\_\_\_\_

## UTILITIES

ELECTRICITY \_\_\_\_\_

GAS \_\_\_\_\_

WATER \_\_\_\_\_

TRASH \_\_\_\_\_

PHONE \_\_\_\_\_

MOBILE \_\_\_\_\_

INTERNET \_\_\_\_\_

CABLE \_\_\_\_\_

*Total* \_\_\_\_\_

*total* \_\_\_\_\_

GROCERIES \_\_\_\_\_

## FOOD

*total* \_\_\_\_\_

ADULTS \_\_\_\_\_

CHILDREN \_\_\_\_\_

*total* \_\_\_\_\_

## CLOTHING

## TRANSPORTATION

CAR PAYMENT \_\_\_\_\_

CAR PAYMENT \_\_\_\_\_

FUEL & OIL \_\_\_\_\_

REPAIRS & TIRES \_\_\_\_\_

AUTO INSURANCE \_\_\_\_\_

*total* \_\_\_\_\_

## PERSONAL

LIFE INSURANCE \_\_\_\_\_

HEALTH INSURANCE \_\_\_\_\_

DISABILITY INSURANCE \_\_\_\_\_

CHILDCARE / SITTER \_\_\_\_\_

ENTERTAINMENT \_\_\_\_\_

OTHER \_\_\_\_\_

OTHER \_\_\_\_\_

OTHER \_\_\_\_\_

*Total* \_\_\_\_\_

# recommended percentages

INCOME 1 \_\_\_\_\_

INCOME 2 \_\_\_\_\_

TOTAL INCOME \_\_\_\_\_

ITEM	RECOMMENDED %	TARGET AMOUNT	ACTUAL AMOUNT
CHARITABLE GIFTS	10-15%	_____	_____
SAVING	10-15%	_____	_____
HOUSING	25-35%	_____	_____
UTILITIES	5-10%	_____	_____
FOOD	5-15%	_____	_____
TRANSPORTATION	10-15%	_____	_____
CLOTHING	2-7%	_____	_____
MEDICAL / HEALTH	5-10%	_____	_____
INSURANCE	10-25%	_____	_____
RECREATION	5-10%	_____	_____
DEBTS	5-10%	_____	_____
PERSONAL	5-10%	_____	_____
OTHER _____	_____	_____	_____
OTHER _____	_____	_____	_____
OTHER _____	_____	_____	_____
OTHER _____	_____	_____	_____
OTHER _____	_____	_____	_____
OTHER _____	_____	_____	_____



# debt snowball plan

[illegible]

BUDGETED

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# income sources recap

EMPLOYMENT	AMOUNT	ARRIVAL DATE
PAYCHECK 1	_____	_____
PAYCHECK 2	_____	_____
COMMISSIONS	_____	_____
BONUS	_____	_____
SELF-EMPLOYMENT	_____	_____
TAX REFUND	_____	_____
OTHER _____	_____	_____

## INVESTMENTS & RETIREMENT

INTEREST INCOME	_____	_____
DIVIDEND INCOME	_____	_____
RENTAL INCOME	_____	_____
TRUST FUND	_____	_____
SOCIAL SECURITY	_____	_____
PENSION	_____	_____
ANNUITY	_____	_____
OTHER _____	_____	_____

## OTHER

DISABILITY INCOME	_____	_____
ALIMONY / CHILD SUPPORT	_____	_____
CASH GIFTS	_____	_____
TANF / SNAP	_____	_____
UNEMPLOYMENT	_____	_____
OTHER _____	_____	_____



# breakdown of savings

CATEGORIES	BALANCE	TARGET AMOUNT
FIRST EMERGENCY FUND (\$1,000)	_____	_____
SECOND EMERGENCY FUND (2-3 MONTHS)	_____	_____
RETIREMENT FUND	_____	_____
COLLEGE FUND	_____	_____
REAL ESTATE TAXES	_____	_____
HOMEOWNER'S INSURANCE	_____	_____
REPAIRS/MAINTENANCE FEES	_____	_____
REPLACE FURNITURE	_____	_____
CAR INSURANCE	_____	_____
CAR REPLACEMENT #1	_____	_____
CAR REPLACEMENT #2	_____	_____
DISABILITY INSURANCE	_____	_____
LONG TERM CARE INSURANCE	_____	_____
HEALTH INSURANCE	_____	_____
DOCTOR	_____	_____
DENTIST	_____	_____
OPTOMETRIST	_____	_____
LIFE INSURANCE	_____	_____
SCHOOL TUITION / SUPPLIES	_____	_____
GIFTS (INCLUDING CHRISTMAS)	_____	_____
VACATION	_____	_____
COMPUTER REPLACEMENT	_____	_____
TIRES	_____	_____
BABY	_____	_____
OTHER _____	_____	_____
OTHER _____	_____	_____
<i>Total:</i>	_____	_____

# credit card payoff history

[illegible]



# detailed budget spending

## Charity

	CARRYOVER	BUDGETED	TOTAL TO SPEND	TOTAL SPENT	REMAINING
TITHES	_____	_____	_____	_____	_____
CHARITY	_____	_____	_____	_____	_____
OTHER _____	_____	_____	_____	_____	_____
OTHER _____	_____	_____	_____	_____	_____

## Saving

EMERGENCY FUND	_____	_____	_____	_____	_____
RETIREMENT FUND	_____	_____	_____	_____	_____
COLLEGE FUND	_____	_____	_____	_____	_____
OTHER _____	_____	_____	_____	_____	_____
OTHER _____	_____	_____	_____	_____	_____

## Housing

FIRST MORTGAGE / RENT	_____	_____	_____	_____	_____
SECOND MORTGAGE	_____	_____	_____	_____	_____
REAL ESTATE TAXES	_____	_____	_____	_____	_____
REPAIRS / MAINTENANCE	_____	_____	_____	_____	_____
ASSOCIATION DUES	_____	_____	_____	_____	_____
OTHER _____	_____	_____	_____	_____	_____
OTHER _____	_____	_____	_____	_____	_____
OTHER _____	_____	_____	_____	_____	_____

PAGE TOTAL:

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# detailed budget spending

## Utilities

	CARRYOVER	BUDGETED	TOTAL TO SPEND	TOTAL SPENT	REMAINING
ELECTRICITY					
NATURAL GAS					
WATER					
TRASH					
PHONE					
MOBILE					
INTERNET					
CABLE					
OTHER _____					
OTHER _____					

## Food

GROCERIES					
RESTAURANTS					
SCHOOL LUNCHES					

## Clothing

ADULTS					
CHILDREN					
DRY CLEANING					
OTHER _____					

PAGE TOTAL:

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# detailed budget spending

## Transportation

	CARRYOVER	BUDGETED	TOTAL TO SPEND	TOTAL SPENT	REMAINING
GAS AND OIL CHANGES					
REPAIRS AND TIRES					
LICENSE AND TAXES					
CAR REPLACEMENT					
CAR PAYMENT #1					
CAR PAYMENT #2					
OTHER					
OTHER					

## Medical & Health

MEDICATIONS					
DOCTOR BILLS					
DENTIST					
OPTOMETRIST					
VITAMINS					
GYM MEMBERSHIP					
OTHER					
OTHER					
OTHER					
PAGE TOTAL:					

# detailed budget spending

## Insurance

	CARRYOVER	BUDGETED	TOTAL TO SPEND	TOTAL SPENT	REMAINING
LIFE INSURANCE					
HEALTH INSURANCE					
HOMEOWNER INSURANCE					
AUTO INSURANCE					
DISABILITY INSURANCE					
LONG TERM CARE INSURANCE					
IDENTITY THEFT					
OTHER _____					

## Personal

CHILDCARE / SITTER					
TOILTRIES					
COSMETICS					
HAIR SALON					
BARBER SHOP					
NAIL SALON					
EDUCATION / TUITION					
ALIMONY					
CHILD SUPPORT					
SUBSCRIPTIONS					
ORGANIZATION DUES					
PAGE TOTAL:					



# detailed budget spending

## Personal Continued

	CARRYOVER	BUDGETED	TOTAL TO SPEND	TOTAL SPENT	REMAINING
GIFTS (INCLUDING HOLIDAYS)					
REPLACE FURNIURE					
HIS SPENDING MONEY					
HER SPENCING MONEY					
KIDS ALLOWANCE					
BABY SUPPLIES					
PET SUPPLIES					
MUSIC / TECHNOLOGY					
OTHER					
OTHER					
OTHER					
OTHER					
OTHER					
OTHER					
OTHER					
OTHER					
OTHER					
OTHER					
Lump Sum Payments					
PAGE TOTAL:					

# detailed budget spending

## Recreation

	CARRYOVER	BUDGETED	TOTAL TO SPEND	TOTAL SPENT	REMAINING
ENTERTAINMENT					
VACATION					
OTHER					
OTHER					
OTHER					
OTHER					

## Debts

CAR PAYMENT 1					
CAR PAYMENT 2					
CREDIT CARD 1					
CREDIT CARD 2					
CREDIT CARD 3					
CREDIT CARD 4					
CREDIT CARD 5					
STUDENT LOAN 1					
STUDENT LOAN 2					
OTHER					
OTHER					
OTHER					
OTHER					

PAGE TOTAL:

detailed budget spending

## Miscellaneous

CARRYOVER

BUDGETED

TOTAL TO SPEND

TOTAL SPENT

REMAINING

OTHER \_\_\_\_\_

OTHER \_\_\_\_\_

OTHER \_\_\_\_\_

OTHER \_\_\_\_\_

OTHER \_\_\_\_\_

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PAGE TOTAL: \_\_\_\_\_

**BUDGET TOTAL:**

# Cash Tracker

CATEGORY

## BUDGET

DATE \_\_\_\_\_

DESCRIPTION

$$\frac{1}{+}$$

BALANCE

[illegible]

# Cash Tracker

CATEGORY

## BUDGET

DATE \_\_\_\_\_

DESCRIPTION

10

## BALANCE

This image shows a blank sheet of white paper with vertical ruling lines. The lines are evenly spaced and run from the top to the bottom of the page. At the very bottom, there is a decorative border consisting of a series of small, overlapping pink and purple shapes, resembling watercolor or marbled paper. The rest of the page is plain white.

# Cash Tracker

CATEGORY

## BUDGET

DATE \_\_\_\_\_

DESCRIPTION

$$\frac{-}{+}$$

BALANCE

[illegible]