

Five-Year Future

FIXED EXPENSES



HOUSING

First Mortgage/Rent _____

Second Mortgage/Home Equity _____

Property Taxes _____

Home/Rent Insurance _____

Association Fees _____

Other: _____

UTILITIES

Gas _____

Electric _____

Phone _____

Internet _____

Cable _____

Water/Sewage _____

Trash _____

Other: _____

AUTO

All Vehicle Payments _____

Vehicle Insurance _____

Other: _____

SAVINGS

Savings _____

Investments _____

Other: _____

OTHER DEBT

Total Credit Card Payments _____

Student Loans _____

Medical Debts Miscellaneous _____

Medical/Life Insurance _____

Tuition/Books _____

Alimony/Child Support _____

Other: _____

VARIABLES



Childcare _____

Work Lunch _____

School Lunch _____

Groceries _____

Household/Toiletries _____

Medical;/Doctor _____

Medications _____

Clothing/Laundry _____

Hair/Nails _____

Pet/Medical _____

Children Allowance _____

Movies/Concerts _____

Misc. Entertainment _____

Dining Out _____

Holidays/Birthdays _____

Donations/Offerings _____

Sports/Recreation _____

Hobbies _____

Lottery/Gambling _____

Tobacco/Alcohol _____

Trips/Vacations _____

Vehicle Gas _____

Vehicle Maintenance _____

Other: _____

Other: _____

Other: _____

Other: _____

Other: _____

Other: _____

Total Monthly Income

Include after tax income: Wages, part time, government assistance, pension, social security, etc.

Total Monthly Expenses

Budget Surplus / Deficit

