



Budget Organizer

Prepared for: _____

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Provided by:

Date:

Fixed Expenses - Personal

	Monthly Amount	Annual Amount
Housing:		
Mortgage/Rent Payment	\$ _____	\$ _____
Property Taxes	_____	_____
Homeowners/Renters Insurance	_____	_____
Transportation:		
Car Payment	_____	_____
Automobile Insurance	_____	_____
Parking/Tolls/Bus/Train	_____	_____
Loans:		
Credit Card Payments	_____	_____
Personal Loan Payments	_____	_____
Personal Insurance:		
Life Insurance Premiums	_____	_____
Disability Income Insurance Premiums	_____	_____
Health Insurance Premiums	_____	_____
Dental/Vision Insurance Premiums	_____	_____
Taxes:		
Federal Income Taxes	_____	_____
State Income Taxes	_____	_____
FICA/Self-Employment Taxes	_____	_____
Personal/Family:		
Child Care Expenses	_____	_____
Education/School Expenses (tuition/fees)	_____	_____
Household Help	_____	_____
Membership/Professional Dues	_____	_____
Savings/Investments:		
Personal Savings/Investments	_____	_____
Education Savings	_____	_____
Retirement Savings	_____	_____
Other Fixed Expenses:		
_____	_____	_____
_____	_____	_____
Total Fixed Expenses	\$ _____	\$ _____

Variable Expenses - Personal

	Monthly Amount	Annual Amount
Housing:		
Utilities (electricity, gas, water)	\$ _____	\$ _____
Telephone/Internet	_____	_____
Home Repair/Maintenance	_____	_____
Household Goods/Furnishings	_____	_____
Transportation:		
Fuel	_____	_____
Auto Repair/Maintenance	_____	_____
Parking/Tolls/Bus/Train	_____	_____
Personal/Family:		
Food/Personal Care Items	_____	_____
Clothing	_____	_____
Laundry/Dry Cleaning	_____	_____
Doctor/Dental/Prescription Drug Expenses	_____	_____
Gifts/Charitable Contributions	_____	_____
Entertainment		
Cable/Satellite TV	_____	_____
Dining Out	_____	_____
Movies/Sporting Events	_____	_____
Babysitter	_____	_____
Hobbies	_____	_____
Vacation/Travel	_____	_____
Other Variable Expenses:		
_____	_____	_____
_____	_____	_____
Total Variable Expenses	\$ _____	\$ _____

Total Personal Expenses

	Monthly Amount	Annual Amount
Total Fixed Expenses	\$ _____	\$ _____
Total Variable Expenses	_____	_____
Total Personal Expenses	\$ _____	\$ _____

Fixed and Variable Expenses - Business

	Monthly Amount	Annual Amount
Rent/Mortgage Payment	\$ _____	\$ _____
Salaries	_____	_____
Employee Benefits	_____	_____
Telephone/Internet	_____	_____
Insurance	_____	_____
Transportation/Fuel Expenses	_____	_____
Travel	_____	_____
Tax/Accounting/Banking Services	_____	_____
Advertising/Promotions	_____	_____
Printing/Stationary/Postage	_____	_____
Business Entertainment	_____	_____
Professional/Association Dues	_____	_____
Other Business Expenses:		
_____	_____	_____
_____	_____	_____
Total Business Expenses	\$ _____	\$ _____

Total Expenses

	Monthly Amount	Annual Amount
Personal:		
Total Fixed Expenses	\$ _____	\$ _____
Total Variable Expenses	\$ _____	\$ _____
Business:		
Total Expenses	\$ _____	\$ _____
Total Expenses	\$ _____	\$ _____

Important Information

This fact finder serves to help identify your financial needs and priorities and may be used in developing proposed solutions consistent with your needs and objectives. In completing this fact finder, you are entrusting our organization with certain personal and confidential financial data. We recognize that our relationship with you is based on trust and we hold ourselves to the highest standards in the safekeeping and use of your confidential information.

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