

# Budget Organizer

Presented by: Your Financial Advisor



Prepared for:

## Income

	Monthly Amount	Annual Amount
<b>Income:</b>		
Salary and Bonuses	\$ _____	\$ _____ 0
Interest/Investment Income	_____	_____ 0
Other Income	_____	_____ 0
<b>Income Sub-Total</b>	_____ 0	_____ 0
<b>Income Taxes:</b>		
Federal Income Taxes	_____	_____ 0
State Income Taxes	_____	_____ 0
FICA/Self-Employment Taxes	_____	_____ 0
<b>Income Taxes Sub-Total</b>	_____ 0	_____ 0
<b>Available Income</b>	\$ _____ 0	\$ _____ 0

## Fixed Expenses - Personal

	Monthly Amount	Annual Amount
<b>Housing:</b>		
Mortgage/Rent Payment	\$ _____	\$ _____ 0
Property Taxes	_____	_____ 0
Homeowners/Renters Insurance	_____	_____ 0
<b>Transportation:</b>		
Car Payment	_____	_____ 0
Automobile Insurance	_____	_____ 0
Parking/Tolls/Bus/Train	_____	_____ 0
<b>Loans:</b>		
Credit Card Payments	_____	_____ 0
Personal Loan/Student Loan Payments	_____	_____ 0
<b>Insurance:</b>		
Life Insurance Premiums	_____	_____ 0
Disability Income Insurance Premiums	_____	_____ 0
Health Insurance Premiums	_____	_____ 0
Dental/Vision Insurance Premiums	_____	_____ 0
<b>Personal/Family:</b>		
Child Support/Child Care Expenses/Alimony	_____	_____ 0
Membership/Professional Dues	_____	_____ 0
<b>Savings/Investments:</b>		
Emergency Fund	_____	_____ 0
Personal Savings/Investments	_____	_____ 0
Retirement Savings (401(k) or IRA)	_____	_____ 0
<b>Other Fixed Expenses:</b>		
	_____	_____ 0
<b>Total Fixed Expenses</b>	\$ _____ 0	\$ _____ 0

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## Variable Expenses - Personal

	Monthly Amount	Annual Amount
<b>Housing:</b>		
Utilities (electricity, gas, water)	\$ _____	\$ _____ 0
Telephone/Internet	_____	_____ 0
Home Repair/Maintenance	_____	_____ 0
Household Goods/Furnishings	_____	_____ 0
<b>Transportation:</b>		
Fuel	_____	_____ 0
Auto Repair/Maintenance	_____	_____ 0
Parking/Tolls/Bus/Train	_____	_____ 0
<b>Personal/Family:</b>		
Food/Personal Care Items	_____	_____ 0
Clothing	_____	_____ 0
Laundry/Dry Cleaning	_____	_____ 0
Doctor/Dental/Prescription Drug Expenses	_____	_____ 0
Gifts/Charitable Contributions	_____	_____ 0
<b>Entertainment:</b>		
Cable/Satellite TV	_____	_____ 0
Dining Out	_____	_____ 0
Movies/Sporting Events	_____	_____ 0
Babysitter	_____	_____ 0
Hobbies	_____	_____ 0
Vacation/Travel	_____	_____ 0
<b>Other Variable Expenses:</b>		
_____	_____	_____ 0
_____	_____	_____ 0
_____	_____	_____ 0
<b>Total Variable Expenses</b>	\$ _____ 0	\$ _____ 0

## Total Personal Expenses

	Monthly Amount	Annual Amount
Total Fixed Expenses	\$ _____ 0	\$ _____ 0
Total Variable Expenses	_____ 0	_____ 0
<b>Total Personal Expenses</b>	\$ _____ 0	\$ _____ 0

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## Fixed and Variable Expenses - Business

	Monthly Amount	Annual Amount
Rent/Mortgage Payment	\$ _____	\$ _____
Salaries	_____	_____
Taxes	_____	_____
Employee Benefits	_____	_____
Telephone/Internet	_____	_____
Insurance	_____	_____
Transportation/Fuel Expenses	_____	_____
Travel	_____	_____
Tax/Accounting/Banking Services	_____	_____
Advertising/Promotions	_____	_____
Printing/Stationary/Postage	_____	_____
Business Entertainment	_____	_____
Professional/Association Dues	_____	_____
<b>Other Business Expenses:</b>		
_____	_____	_____
_____	_____	_____
<b>Total Business Expenses</b>	<b>\$ _____ 0</b>	<b>\$ _____ 0</b>

## Balance Sheet

	Monthly Amount	Annual Amount
Available Income	\$ _____ 0	\$ _____ 0
Total Personal Expenses	- _____ 0	- _____ 0
Total Business Expenses	- _____ 0	- _____ 0
<b>Surplus/Shortage</b>	<b>\$ _____ 0</b>	<b>\$ _____ 0</b>