Budget Organizer

Presented by: Your Financial Advisor



Prepared for:

	Income		Monthly			Annual	
Income:			Amount			Amount	
Salary and Bonuses		\$			\$		
Interest/Investment Income							
Other Income							
	ne Sub-Total			0			
Income Taxes: Federal Income Taxes							
State Income Taxes							
FICA/Self-Employment Taxes				<u> </u>			
	es Sub-Total			0			
	able Income	¢		0	\$		
Avai	able mcome	<u>.</u>		<u> </u>	<u> </u>		
Fixe	d Expenses -	Pers	onal				
			Monthly			Annual	
Housing:		¢	Amount		¢	Amount	
Mortgage/Rent Payment Property Taxes		\$			\$		
Homeowners/Renters Insurance				<u> </u>			
Transportation:							
Car Payment							
Automobile Insurance							
Parking/Tolls/Bus/Train							
Loans:							
Credit Card Payments							
Personal Loan/Student Loan Payments							
Insurance:							
Life Insurance Premiums							
Disability Income Insurance Premiums							
Health Insurance Premiums							
Dental/Vision Insurance Premiums							
Personal/Family:							
Child Support/Child Care Expenses/Alimony	/						
Membership/Professional Dues							
Savings/Investments:							
Emergency Fund							
Personal Savings/Investments							
Retirement Savings (401(k) or IRA)							
Other Fixed Expenses:							
Total Fixed Expe	enses	\$		0	\$		
				<u> </u>	<u> </u>		

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Prepared for:

Variable Exp	enses - Personal		
Housing:	Monthly Amount	Amo	nual ount
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:		<u> </u>	
Cable/Satellite TV			
Dining Out			
Movies/Sporting Events			
Babysitter		<u> </u>	
Hobbies		,	
Vacation/Travel			
Other Variable Expenses:			
·			
Total Variable Expenses	\$	0 \$	
Total Pers	onal Expenses		
	Monthly	Ann	nual
	Amount	Amo	ount

Total Personal Expenses

_____0 ____\$____\$

0

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Prepared for:

	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		
Other Business Expenses:		

Balan	ce Sheet				
	Monthly Amount		Annual Amount		
Available Income	\$	0	\$	0	
Total Personal Expenses	-	0	-	0	
Total Business Expenses	-	0	-	0	
Surplus/Shortage	\$	0	\$	0	

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