

FILLABLE AND CUSTOMIZABLE BUDGET WORKSHEET
 (Change line item labels to suit your needs)

| Household | | | | |
|------------------|----------------|-------------|------------|--|
| Description | Monthly Amount | Inflation % | Start Date | End Date |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| Total | \$ | | | |

| Daily Living | | | | |
|---------------------|----------------|-------------|------------|--|
| Description | Monthly Amount | Inflation % | Start Date | End Date |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| Total | \$ | | | |

| Healthcare & Insurance | | | | |
|-----------------------------------|----------------|-------------|------------|--|
| Description | Monthly Amount | Inflation % | Start Date | End Date |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| Total | \$ | | | |

| ■ Transportation | | | | |
|------------------|----------------|-------------|------------|--|
| Description | Monthly Amount | Inflation % | Start Date | End Date |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| Total | \$ | | | |

| ■ Debt & Obligations | | | | |
|----------------------|----------------|-------------|------------|--|
| Description | Monthly Amount | Inflation % | Start Date | End Date |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| Total | \$ | | | |

| ■ Entertainment | | | | |
|-----------------|----------------|-------------|------------|--|
| Description | Monthly Amount | Inflation % | Start Date | End Date |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| Total | \$ | | | |

| ■ Miscellaneous | | | | |
|-----------------|----------------|-------------|------------|--|
| Description | Monthly Amount | Inflation % | Start Date | End Date |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| | \$ | % | ___/___ | <input type="checkbox"/> Life or ___/___ |
| Total | \$ | | | |

The information provided in the analysis is an overview and may not be a complete depiction of your financial concerns or outlook.

Client Initial _____ Client Initials _____ Agent Initials _____ Date _____ 2