

Family Budget Planner



Zero-Based Budget Worksheet

DATE OF MONTH

1. INCOME	BUDGET	ACTUAL
Gross Income 1		
Gross Income 2		
Social Security / Pension		
Interest / Dividends		
TOTAL	0.00	0.00

2. ADJUSTMENTS	BUDGET	ACTUAL
Tax Withholdings		
Other Paycheck Deductions		
Tithing		
Priority Savings		
SUBTOTAL	0.00	0.00
BUDGET REMAINING	0.00	0.00

3. BIG BILLS	BUDGET	ACTUAL
Mortgage/Rent		
Health Insurance		
Car Insurance		
Property Tax		
Medical Bills		
Replacement		

MONTH, YEAR

5. SMALL BILLS	BUDGET	ACTUAL
Utilities: Water/Sewer/Trash		
Utilities: Electric/Gas		
Utilities: Internet		
Utilities: Phone		
Utilities: Cable / Streaming		
Medical / Dental / Vision		
Magazine Subscription		
Life Insurance (term)		
Home/Rent Insurance		
SUBTOTAL	0.00	0.00
BUDGET REMAINING	0.00	0.00

6. DAILY LIVING	BUDGET	ACTUAL
☐ Groceries		
☐ Dining / Fun		
☐ Clothing		
☐ Supplies		
☐ Gas / Fares		
☐ Gifts		
☐ Medicine		
☐ Pet Care		

Personal Balance Sheet

As of: 7/16/2015

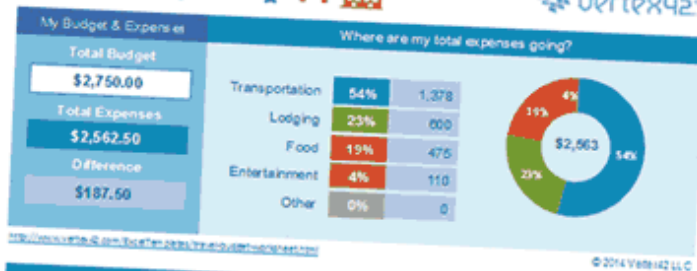
Assets

Cash		
Checking Accounts	Schedule 1	5
Savings Accounts	Schedule 1	
CDs (certificates of deposit)	Schedule 1	
Other Cash		
Total Cash		5
Investments		
Life Insurance (cash surrender value)	Schedule 2	
Brokerage Accounts (non-retirement)	Schedule 3	
Securities (stocks, bonds, mutual funds)	Schedule 4	
Investment Real Estate (market value)	Schedule 5a	
Treasury Bills/Notes		
Other Investments		
Total Investments		
Personal Property		
Primary Residence (market value)	Schedule 5a	2
Automobiles (present value)	Schedule 5b	
Bullion (silver, gold, etc)	Schedule 5c	
Jewelry, Art and Collectibles	Schedule 5d	
Other Property	Schedule 5e	
Total Property		2
Retirement		
Retirement Accounts (IRA, 401k)	Schedule 6	
Pension and Profit Sharing	Schedule 7	
Social Security (\$/month * 240)		
Other Assets		
Total Retirement		
Notes and Accounts Receivable		
Notes and Accounts Receivable	Schedule 8	
Other Notes		
Total Notes		
Total Assets		

Travel Budget



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What are my expenses?

Description	Type	Quantity	Unit Cost	Amount
Flights	Transportation	2	600.00	1,200.00
Taxi & Bus	Transportation	5	30.00	150.00
Hotel (nights, cost/night)	Lodging	5	120.00	600.00
Breakfast & Lunch	Food	5	45.00	225.00
Dinners	Food	5	50.00	250.00
Museum Tickets	Entertainment	2	20.00	40.00
Live Show Tickets	Entertainment	2	20.00	40.00
Driving (miles, cost/mile)	Transportation	50	35.00	1,750.00