

| Family Budget Details | | | Date: |
|------------------------------------|--------------------|--|---|
| Name | | | |
| | | | |
| Income: | Mo. Amts | Irregular Amounts (not monthly) | Source of income: |
| Monthly Take home - applicant: | | | |
| Monthly Take Home - spouse: | | | |
| Other Income Source | | | |
| Other Income Source | | | |
| Total Income | 0.00 | | Net Worth Snapshot |
| Giving | | | Assets: |
| Savings/Investing | | | Current Value |
| Housing Costs: | | | Cash in banks/savings |
| Rent (if applicable) | | | Investment Accounts |
| Home - Electric | | | Retirement Accounts |
| Home - Gas | | | Vehicle 1 |
| Home - Water | | | Vehicle 2 |
| Home - Phone | | | Real Estate/Home |
| Home - Trash removal | | | Rental/Investment Property |
| Home - Insurance | | | Household Items |
| Home - Property Taxes | | | Collectibles |
| Home - Cable/internet/Cell ph | | | Other: |
| Home - Repairs/Maintenance | | | |
| Transportation Costs: | | | Total Assets: |
| Car Gas/oil | | | 0.00 |
| Car Insurance | | | Debts: |
| Car Plates/tags | | | Current Balance |
| Car Repairs | | | House Payment |
| Other: | | | Car Payment 1: |
| Groceries/Food | | | Car Payment 2: |
| Clothing | | | School Loan 1: |
| Entertainment/Recreation | | | School Loan 2: |
| Medical/Dental - Rx & recurring | | | IRS balances/prior years |
| Health Insurance | | | Medical Bills with balances |
| Life Insurance | | | |
| Disability Insurance | | | Credit cards |
| IRS or estimated tax payments | | | |
| Vacation | | | |
| Gifts/Christmas | | | |
| School/Child care | | | Other Loans: Please Describe |
| Misc/Allowances | | | |
| Debt (list each separately) | Mo. Min Pmt | | |
| House Payment | | | |
| Car Payment 1: | | | Total Debts: |
| Car Payment 2: | | | 0.00 |
| School Loan 1: | | | Net Worth |
| School Loan 2: | | | 0.00 |
| IRS balances/prior years | | | (Assets less Debts) |
| Medical Bills with balances | | | Year, make and mileage of car(s): |
| Credit cards | | | |
| Other Loans: | | | Are school loans undergrad or graduate schools? |
| | | | |
| TOTAL SPENDING | 0.00 | | |
| Monthly Surplus/Deficit | 0.00 | | |