

Family Budget Details			Date:
Name			
<u>Income:</u>	Mo. Amts	Irregular Amounts (not monthly)	Source of income:
Monthly Take home - applicant:			
Monthly Take Home - spouse:			
Other Income Source			
Other Income Source			
<b>Total Income</b>	<b>0.00</b>		<u>Net Worth Snapshot</u>
<b>Giving</b>			<b>Assets:</b>
<b>Savings/Investing</b>			<b>Current Value</b>
<b>Housing Costs:</b>			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			
<b>Transportation Costs:</b>			<b>Total Assets:</b>
Car Gas/oil			<b>0.00</b>
Car Insurance			<b>Debts:</b>
Car Plates/tags			<b>Current Balance</b>
Car Repairs			House Payment
<b>Other:</b>			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			
<b>Debt (list each separately)</b>	Mo. Min Pmt		
House Payment			
Car Payment 1:			<b>Total Debts:</b>
Car Payment 2:			<b>0.00</b>
School Loan 1:			<b>Net Worth</b>
School Loan 2:			<b>0.00</b>
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?
<b>TOTAL SPENDING</b>	<b>0.00</b>		
<b>Monthly Surplus/Deficit</b>	<b>0.00</b>		