

BUDGET WORKSHEET



VOSBERG WEALTH
MANAGEMENT

www.VosbergWealth.com | 626.358.5458

Name: _____

Date: _____

KNOW YOUR NUMBER: Use this worksheet to assist you to map out your monthly expenses so that you may have an accurate assessment of your monthly budget figure.

HOUSEHOLD	EXPENSES	MONTHLY TOTAL
	Mortgage - Principal & Interest	\$
	Home Equity Loan	\$
	Real Estate Taxes	\$
	Homeowners Insurance	\$
	Association Dues	\$
	Rent	\$
	Renters Insurance	\$
	Gas	\$
	Electricity	\$
	Water/Sewer	\$
	Gardener	\$
	Pool/Spa/Fountain Services	\$
	Cable/Internet	\$
	Phone	\$
Maintenance & Improvements	\$	
House Cleaning	\$	
Furnishings	\$	
Total	\$	

DEBT & OBLIGATIONS	EXPENSES	MONTHLY TOTAL
	Credit Cards	\$
	Tuition - Student Loans	\$
	Alimony	\$
	Child Support	\$
Total	\$	

DAILY LIVING	EXPENSES	MONTHLY TOTAL
	Food	\$
	Dining Out	\$
	Clothing	\$
	Personal Care	\$
	Bank Charges	\$
	Books/Magazines	\$
	Household Items	\$
	Laundry/Dry Cleaning	\$
	Pet Care	\$
	Gym Membership	\$
Total	\$	

HEALTH & INSURANCE	EXPENSES	MONTHLY TOTAL
	Health Insurance	\$
	Health - Copays & Deductibles	\$
	Prescriptions	\$
	Life Insurance	\$
	Long Term Care Insurance	\$
	Disability Insurance	\$
	Dental Insurance	\$
	Vision Insurance	\$
Total	\$	

TRANSPORTATION	EXPENSES	MONTHLY TOTAL
	Auto Loan/Lease Payments	\$
	Auto Insurance	\$
	Registration	\$
	Fuel	\$
	Car Wash/Detailing	\$
	Repairs/Maintenance	\$
	Parking/Tolls	\$
	Public Transportation- Metro, Uber	\$
Total	\$	

ENTERTAINMENT	EXPENSES	MONTHLY TOTAL
	Travel	\$
	Hobbies	\$
	Membership Dues	\$
	Parties & Events	\$
	Subscriptions	\$
Total	\$	

MISCELLANEOUS	EXPENSES	MONTHLY TOTAL
	Children/Grandchildren Support	\$
	Charitable Donations	\$
	Gifts	\$
	ATM/Cash Withdraws	\$
	Other	\$
	Other	\$
Total	\$	

TOTAL MONTHLY EXPENSES	\$
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Client Initials _____ Date _____

Values are provided by client and not verified by advisor.

Securities and advisory services offered through Centaurus Financial, Inc. Member FINRA and SIPC, a Registered Investment Advisor.
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