

BUDGET WORKSHEET

<p>▶ INCOME Annual Amount</p> <p>Annual Income (After Taxes) _____</p> <p>▶ ESSENTIAL ANNUAL EXPENSES</p> <p>Contribution to Retirement Savings _____</p> <p>Housing</p> <p>Rent or Mortgage _____</p> <p>Property Taxes and Insurance _____</p> <p>Home and Appliance Maintenance _____</p> <p>Utilities _____</p> <p>Other _____</p> <p>Necessities</p> <p>Groceries _____</p> <p>Health and Beauty Aids _____</p> <p>Clothing _____</p> <p>Laundry and Dry Cleaning _____</p> <p>Health Care and Insurance</p> <p>Health Insurance _____</p> <p>Medicare Premiums _____</p> <p>Dental and Vision Care _____</p> <p>Other Uncovered Expenses _____</p> <p>Life Insurance _____</p> <p>Long-Term Care Insurance _____</p> <p>Family Care</p> <p>Long-Term Care for Parent _____</p> <p>Assisted Living for Parent _____</p> <p>Support for Children or Grandchildren _____</p> <p>Other _____</p>	<p style="text-align: right;">Annual Amount</p> <p>Routine Transportation</p> <p>Auto Loan or Lease Payment _____</p> <p>Insurance _____</p> <p>Maintenance, Excise Tax _____</p> <p>Gasoline _____</p> <p>Auto Club _____</p> <p>Other _____</p> <p>Miscellaneous _____</p> <p>Sub-Total: Essential Annual Expenses </p> <p>▶ DISCRETIONARY ANNUAL EXPENSES</p> <p>Entertainment</p> <p>Club Membership _____</p> <p>Travel and Vacations _____</p> <p>Hobbies _____</p> <p>Continued Education _____</p> <p>Other _____</p> <p>Gifts and Charitable Contributions _____</p> <p>Miscellaneous _____</p> <p>Sub-Total: Discretionary Annual Expenses </p> <p>TOTAL: ESSENTIAL ANNUAL EXPENSES + DISCRETIONARY ANNUAL EXPENSES = </p>
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