

# MONTHLY INCOME ALLOCATION

MONTH/YEAR: \_\_\_\_\_  
TOTAL MONTHLY INCOME  
TOTAL EXPENSES  
NET SAVINGS

| CATEGORY ITEM           | BUDGETED AMOUNT | ACTUAL SPENT |
|-------------------------|-----------------|--------------|
| Housing & Utilities     |                 |              |
| Rent / Mortgage         |                 |              |
| Electricity / Water     |                 |              |
| Internet / Phone        |                 |              |
| Transportation          |                 |              |
| Fuel / Public Transit   |                 |              |
| Insurance / Maintenance |                 |              |
| Food & Lifestyle        |                 |              |

| CATEGORY ITEM | BUDGETED<br>AMOUNT | ACTUAL SPENT |
|---------------|--------------------|--------------|
|---------------|--------------------|--------------|

|           |  |  |
|-----------|--|--|
| Groceries |  |  |
|-----------|--|--|

|            |  |  |
|------------|--|--|
| Dining Out |  |  |
|------------|--|--|

|               |  |  |
|---------------|--|--|
| Entertainment |  |  |
|---------------|--|--|

|                                |  |  |
|--------------------------------|--|--|
| <b>Financial &amp; Savings</b> |  |  |
|--------------------------------|--|--|

|                |  |  |
|----------------|--|--|
| Emergency Fund |  |  |
|----------------|--|--|

|             |  |  |
|-------------|--|--|
| Investments |  |  |
|-------------|--|--|

|                |  |  |
|----------------|--|--|
| Debt Repayment |  |  |
|----------------|--|--|

|                      |  |  |
|----------------------|--|--|
| <b>Miscellaneous</b> |  |  |
|----------------------|--|--|

|            |  |  |
|------------|--|--|
| Healthcare |  |  |
|------------|--|--|

|               |  |  |
|---------------|--|--|
| Personal Care |  |  |
|---------------|--|--|

## NOTES & GOALS