

MONTHLY INCOME ALLOCATION

Financial Planning Worksheet

Month/Year _____
Total Income \$ _____

CATEGORY ITEM	BUDGETED	ACTUAL	DIFFERENCE
HOUSING & UTILITIES			
Rent / Mortgage			
Electricity / Water			
Internet / Phone			
ESSENTIALS			
Groceries			
Transportation / Fuel			
Insurance Premiums			
FINANCIAL GOALS			
Emergency Fund			

CATEGORY ITEM	BUDGETED	ACTUAL	DIFFERENCE
Debt Repayment			
Investments			
LIFESTYLE			
Dining / Leisure			
Personal Care			
Miscellaneous			

Essential Monthly Budget Template • For Personal Use Only

Remaining Balance \$ _____