

MONTHLY INCOME ALLOCATION

Budget Period: _____

TOTAL MONTHLY INCOME

TOTAL PLANNED EXPENSES

NET SAVINGS / SURPLUS

ALLOCATION CATEGORY	PLANNED (\$)	ACTUAL (\$)
Housing & Utilities		
Rent / Mortgage		
Electricity / Water / Gas		
Internet / Communication		
Daily Living		
Groceries		
Transportation / Fuel		
Insurance (Health/Auto)		

ALLOCATION CATEGORY	PLANNED (\$)	ACTUAL (\$)
Financial Goals		
Emergency Fund		
Retirement / Investments		
Debt Repayment		
Lifestyle		
Dining Out / Entertainment		
Personal Care / Shopping		
Miscellaneous		
NOTES & FINANCIAL REFLECTIONS		