



MONTHLY SPENDING BUDGET CURRENT VS PLAN

Please fill out your household's current average monthly income and expenses in the blank fields below. You can use approximate/rounded figures where needed. Please leave the "Projected" column blank for now - you will work through a revised monthly spending plan (if relevant) with your coach!

Do not edit these summary fields - these will auto-populate from your income & expense data below

SUMMARY	Current \$	Projected \$
Net Monthly Income		
Less: Total fixed expenses		
Less: Total variable expenses		
Total surplus /(deficit)		

Please populate with household average net monthly income (i.e., take-home income post taxes and benefits)

NET MONTHLY INCOME	Current \$	Projected \$
Employment - full time		
Employment - part time		
Self-employment income		
Spousal support		
Child support		
Investment income		
Pension		
Social Security		
Supplementary Security Income (SSI)		
Social Security Disability Insurance (SSDI)		
Other*		
Total net income		

NOTES ON "OTHER" INCOME (if relevant)



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Please populate with household average monthly fixed and variable expenses

FIXED EXPENSES	Current \$	Projected \$
Mortgage/Rent		
Electricity		
Natural gas		
Water/Sewer/Garbage		
HOA		
Home/Cell phone		
Cable/Internet		
Loan(s) repayment		
Car/vehicle payment(s)		
Car insurance		
Life insurance		
2nd Life insurance		
Pet insurance		
Other insurance		
Medical bills		
Child Support/ alimony		
Donations		
Credit Cards *		
Savings set aside		
Other (approx. total + notes)		
Total fixed expenses		

VARIABLE EXPENSES	Current \$	Projected \$
Gas/Transportation		
Groceries		
Household Supplies		
Eating Out / Takeout		
School Lunches		
Entertainment		
Personal Care/Hair care		
Clothing		
Medical		
Gym /Fitness membership		
Pet Supplies		
Home maintenance		
Other (approx. total + notes)		
Total variable expenses		

NOTES ON "OTHER" EXPENSES (if relevant)

**i.e., fees/interest, or monthly minimum payment - try not to duplicate expenses charged to credit card but already*