



CALIFORNIA

WEALTH ADVISORS

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Budget Worksheet

CATEGORY	BUDGET AMOUNT
INCOME-	
Regular Income:	
Wages and Bonuses	
Interest Income	
Investment Income	
Miscellaneous Income	
<i>Income Subtotal</i>	\$ -
Income Taxes Withheld:	
Federal Income Tax	
State and Local Income Tax	
Social Security / Medicare Tax	
<i>Income Tax Subtotal</i>	\$ -
Investments and Savings:	
401(K) / IRA	
Stocks / Bonds / Mutual Funds	
College Fund	
Savings	
Emergency Fund	
<i>Investment Total</i>	\$ -
EXPENSES-	
Home:	
Mortgage or Rent	
Homeowners / Renters Insurance	
Property Taxes	
Home Repairs / Maintenance	
HOA Fees	
Home Improvements	
Utilities:	
Electricity	
Water and Sewer	
Natural Gas or Oil	
Internet (Phone / Computer)	
Food:	
Groceries	
Eating Out, Lunches, Snacks	

Family Obligations:	
Child Support	
Day Care, Babysitting	
Health and Medical:	
Insurance (Medical / Dental)	
Out-of-Pocket Medical	
Fitness (Yoga / Massage / Gym)	
Transportation:	
Car Payments	
Gasoline / Oil/Electric	
Auto repairs / Car Maintenance	
Parking	
Auto Insurance	
Other (Bus, Taxi, Subway)	
Debt Payments:	
Credit Cards	
Student Loans	
Other Loans	
Entertainment / Recreation:	
Hobbies	
Subscriptions and Dues	
Vacations	
Videos and Movies	
Pets:	
Food	
Grooming	
Miscellaneous:	
Clothing	
Toiletries / Household Products	
Gifts / Donations	
Grooming (Hair, Make-up, Other)	
Miscellaneous Expense	
Total Expenses	\$ -

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