

MTS1040 Personal Monthly Budget

832-687-1040 MCDONALD TAX SERICE...

| | | |
|---------------------------------|-----------------------------|--|
| PROJECTED MONTHLY INCOME | Income 1 | |
| | Extra Income | |
| | Total monthly income | |

| | | |
|------------------------------|-----------------------------|--|
| ACTUAL MONTHLY INCOME | Income 1 | |
| | Extra Income | |
| | Total monthly income | |

| HOUSING | Projected Cost | Actual Cost | Difference |
|------------------------|----------------|-------------|------------|
| Mortgage | | | |
| Phone | | | |
| Cell Phones | | | |
| Electric | | | |
| Water and sewer | | | |
| Satellite/Cable | | | |
| Waste removal | | | |
| Maintenance or repairs | | | |
| Supplies | | | |
| HOA Fee | | | |
| Subtotals | | | |

| TRANSPORTATION | Projected Cost | Actual Cost | Difference |
|-----------------------|----------------|-------------|------------|
| Vehicle payment | | | |
| Bus/taxi fare | | | |
| Insurance | | | |
| Licensing | | | |
| Fuel | | | |
| Maintenance | | | |
| Toll | | | |
| Subtotals | | | |

| INSURANCE | Projected Cost | Actual Cost | Difference |
|------------------|----------------|-------------|------------|
| Home | | | |
| Health | | | |
| Life | | | |
| Other | | | |
| Subtotals | | | |

| FOOD | Projected Cost | Actual Cost | Difference |
|------------------|----------------|-------------|------------|
| Groceries | | | |
| Dining out | | | |
| Other | | | |
| Subtotals | | | |

| PETS | Projected Cost | Actual Cost | Difference |
|------------------|----------------|-------------|------------|
| Food | | | |
| Medical | | | |
| Grooming | | | |
| Toys | | | |
| Other | | | |
| Subtotals | | | |

| PERSONAL CARE | Projected Cost | Actual Cost | Difference |
|---------------------------|----------------|-------------|------------|
| Medical | | | |
| Hair/nails | | | |
| Clothing | | | |
| Dry cleaning | | | |
| Health club | | | |
| Organization dues or fees | | | |
| Other | | | |
| Subtotals | | | |

| | |
|---|--|
| PROJECTED BALANCE (Projected income minus expenses) | |
| ACTUAL BALANCE (Actual income minus expenses) | |
| DIFFERENCE (Actual minus projected) | |

| ENTERTAINMENT | Projected Cost | Actual Cost | Difference |
|----------------------|----------------|-------------|------------|
| Video/DVD | | | |
| CDs | | | |
| Movies | | | |
| Concerts | | | |
| Sporting events | | | |
| Live theater | | | |
| Other | | | |
| Other | | | |
| Subtotals | | | |

| LOANS | Projected Cost | Actual Cost | Difference |
|------------------|----------------|-------------|------------|
| Citi Card | | | |
| Chase | | | |
| Discover | | | |
| Bank of America | | | |
| AAA | | | |
| Other | | | |
| Other | | | |
| Other | | | |
| Other | | | |
| Subtotals | | | |

| TAXES | Projected Cost | Actual Cost | Difference |
|------------------|----------------|-------------|------------|
| Federal | | | |
| State | | | |
| Local | | | |
| Other | | | |
| Subtotals | | | |

| SAVINGS OR INVESTMENTS | Projected Cost | Actual Cost | Difference |
|-------------------------------|----------------|-------------|------------|
| Retirement account | | | |
| Investment account | | | |
| Other | | | |
| Subtotals | | | |

| GIFTS AND DONATIONS | Projected Cost | Actual Cost | Difference |
|----------------------------|----------------|-------------|------------|
| Church | | | |
| Charity | | | |
| Gift | | | |
| Subtotals | | | |

| LEGAL | Projected Cost | Actual Cost | Difference |
|------------------|----------------|-------------|------------|
| Attorney | | | |
| Other | | | |
| Other | | | |
| Other | | | |
| Subtotals | | | |

| | |
|-----------------------------|--|
| TOTAL PROJECTED COST | |
| TOTAL ACTUAL COST | |
| TOTAL DIFFERENCE | |