

# Household Monthly Budget

Please enter your data in gray cells. Orange cells will automatically total in Excel

Applicant Name		Budget
Guardian Name		
<b>Income monthly- Please include all taxable and non-taxable income</b>		
Net monthly wages, salaries, tips, etc. <i>Please submit w-2s and most recent pay stubs</i>		\$
Net monthly wages, salaries, tips, etc. <i>Please submit w-2s and most recent pay stubs</i>		
Unemployment, workers' comp, Social Security, Supplemental Security, public assistance, TANF, veterans' payments, survivor benefits, pension and/or retirement income. <i>Please submit Documentation</i>		
Interest, dividends, rents, royalties, income from estates, trusts, educational assistance, alimony, childsupport, assistance from outside the household, and other miscellaneous sources <i>Please submit documentation</i>		
Other		
Other		
Total Income		\$
<b><i>Please submit an entire complete copy of your most recent income tax return. Please black out social security numbers on all documents before sending</i></b>		
<b>Expenses monthly</b>		
Fixed Costs		
Mortgage / Rent Expense / HOA Fees / Homeowner's Insurance/ Property Tax		\$
Other Fixed Cost Child Support/ Alimony		
Childcare		
Car / Lease Payment(s)/ Vehicle insurance		
Loan Payment(s)		
Insurance - Life		
Other Fixed Cost Education, Name of Student(s) _____		
Other Fixed Cost Please list _____		
Total Fixed Costs		\$
Semi Variable Costs		
Food (Dining Out & Groceries)		\$
Electric / Natural gas/ Propane / Heating Oil Expense		
Medical / Healthcare		
Gasoline		
Cell Phone		
Telephone (landline) Expense		
Cable / Satellite Television Expense		
Internet Expense		
Credit Card Monthly Payment		
Personal Care		
Charitable Contributions		
Pet Food/ Supplies		
Other Semi Variable Costs please list _____		
Total Semi Variable Costs		\$
Highly Variable Costs		
Clothing		\$
Gifts		
Entertainment		
Miscellaneous Please list _____		
Other Highly Variable Costs		
Other Highly Variable Costs		
Retirement Plan Contributions		
Total Highly Variable Costs		\$
Total Expenses		\$
<b>Discretionary</b>		\$

# Assets and Liabilities

Please enter your data in gray cells. Orange cells will automatically total in Excel

<b>Applicant Name</b>	
<b>Guardian Name</b>	
<b>Assets</b>	
<b>Real Estate</b>	<b>Total</b>
Property 1, total equity (value of property minus mortgage)	\$
Property 2, total equity (value of property minus mortgage) (submit other properties on a separate sheet)	
<b>Assets</b>	
Savings current balance	
Checking current balance	
Stocks, Bonds, Securities, etc. Current value	
Retirement Savings Current Value	
Trusts and inheritances Current value	
Business Assets Current Value	
Other Assets Value Current Value	
<b>Vehicles</b>	
Vehicle 1 Equity (value of vehicle minus vehicle loan)	
Vehicle 2 Equity (value of vehicle minus vehicle loan)	
Vehicle 3 Equity (value of vehicle minus vehicle loan)	
<b>Total Asset Value</b>	\$
<b>Liabilities</b>	
Personal Loans	\$
Credit cards	
Equity Loans (not on property listed above)	
Other Liabilities	
<b>Total Liabilities</b>	\$
<b>Equity</b>	\$