

BUDGET

INCOME

- Wages
- Income from self-employment or business ownership
- SSI/SSDI
- Food Stamps/WIC
- Other Public Benefits
- Alimony/Child Support
- Unemployment Benefits
- Worker's Compensation
- Veteran's Compensation
- Rental Income
- Interest/Investment Income
- Income from other household members
- Other Income



EXPENSES

Categories:

- Housing (Mortgage Payments, HELOC Payments)
- Utilities
- Food
- Transportation
- Health-Related
- Child/Dependent-Related
- Credit Card/Loan Payments
- Personal
- Miscellaneous



**NET
INCOME**

BALANCE SHEET

ASSETS

- Checking Account(s)
- Savings Account(s)
- Cash – not already included in checking and savings accounts
- Vehicles
- Primary Residence
- Real Estate – other than Primary Residence
- Other Investments/Assets – stocks, bonds, mutual funds, IRA/retirement accounts, cash value life insurance, etc.
- College Savings Account – 529 or Other
- Business



LIABILITIES

Categories:

- Housing (Mortgage Balance, HELOC Balance)
- Credit Card/ Other Loan Balances
- Unpaid Bills (not in collection)
- Collections/Judgments



**NET
WORTH**