

HUECU BUDGETING WORKSHEET

TOP 3 FINANCIAL GOALS

Where do you want to be financially in the next few months or even in the next few years and what steps will you take to achieve these goals?

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CREDIT SCORE

ASSETS	VALUE
Property	
Retirement (401k, etc)	
Savings	
Other	
Other	
TOTAL ASSETS	

OUTSTANDING DEBTS	BALANCE	INTEREST RATE
Auto Loan(s)		
Credit Card(s)		
Mortgage		
Student Loan(s)		
Other		
Other		
TOTAL DEBT		
NET WORTH		

MONTHLY INCOME		CURRENT	PROPOSED
INCOME	Job(s) after deductions		
	Child Support/ Alimony		
	Government Payments		
	Interest/Investment		
	Rental Income		
	Spouse's Job(s) after deductions		
	Other		
A	TOTAL INCOME		

MONTHLY EXPENSES		CURRENT	PROPOSED
HOUSE	Rent(s)/Mortgage(s)		
	Gas/ Electric		
	Groceries		
	House repairs/landscaping		
	Insurance		
	Internet/Cable/Satellite		
	Property Taxes		
	Telephone		
	Water/Sewer/Garbage		
	Other		

TRANSPORTATION	Car Payment(s)		
	Excise Tax (s)		
	Fuel		
	Insurance		
	Maintenance/Repairs		
	MBTA/Commuter Rail Passes		
	Tolls/Parking		
	Other		

OTHER	Retirement		
	Childcare		
	Clothes		
	Credit Card Payments		
	Dining Out		
	Dry Cleaners		
	Emergency Savings		
	Internet Subscriptions		
	Membership (Gym, Clubs)		
	Money Sent Home		
	Prescriptions		
	Student Loans		
	Vacation		
	Weekly Spending Money		
	Other		
	Other		

B	TOTAL EXPENSES		
NET			
A	TOTAL INCOME		
B	TOTAL EXPENSES		
A-B	OVER/UNDER		