The Board of Pensions
of the Presbyterian Church (U.S.A.)

Personal Financial Budget Worksheet *(Monthly/Annual Spending Plan)*

	Monthly	Annual
Income		
Salary (self & other)	$	$
Investment income		
Social Security income		
Rental income		
Other income		
Total income	$	$
Expenses		
Donations		
Religious	$	$
Charitable		
Other donations		
Savings & Investments		
Emergency funds		
Other savings		
Retirement plans		
Stocks, bonds, mutual funds		
Real estate		
Annuities		
Income taxes		
Insurance		
Life		
Health		
Disability		
Auto		
Homeowner's/renter's		
Long-Term care		
Other insurance		
Liabilities		
Mortgage/rent		
Home equity loans/lines of credit		
Real estate taxes		
Automobile loan(s)		
Personal loan(s)		
Credit cards		
Other liabilities		

Household Expenses

Food

Clothing

Doctor/dentist

Prescriptions

Personal care

Utilities

Telephone

Maintenance

Home furnishing

Entertainment, cable TV

Newspaper, books, magazines

Vacation & travel

Gifts

Children's allowance

Other household expenses

Transportation

Gas & oil

Maintenance & repair

License

Public transit

Parking/tolls

Other Expenses

Legal fees

Accounting fees

Domestic help, yard/pool

Dry cleaning, laundry

Veterinary

Child care

Alimony

Child support

Education, lessons

Club dues, membership

Miscellaneous

Total Expenses $ $

Plan Summary

Total income $

(minus)
Total expenses - $

(equals)
Net income *(or loss)* = $