

BUDGET PLANNER

Date _____

Client Name _____

Monthly Income		Comments	
	Client 1	Client 2	
Salary/ Wage (NET-after tax)			Total Income
Overtime, Bonuses and Commissions			Total Expenses
Business Income			Total Surplus Funds
Super Pension			
Income From Investments			
Rental Income			Comments
Family Trust Distributions			
Maintenance Payments			
Annuity Income			
Benefits e.g. Centrelink/ Pensions			
Work Compensation Payments			
Future Income e.g. Inheritance			
Other			
Total Monthly			
Total Yearly			
Joint Income Frequency			

Expenses

Budget	Monthly	Yearly	Budget	Monthly	Yearly	Budget		
Household Expenses			Debt Payments			Insurance		
Mortgage/Rent			Mortgage			Home and Contents		
Repairs			Credit Cards			Car		
Gas/Water/Electricity			Personal Loan			Health		
Telephone/Mobile Phone			Car Loan			Life		
Rates			Store Cards			Income Protection		
Body Corp Fees			Interest Free Finance			SUB TOTAL		
Internet			Lay-bys			Other Expenses		
Pay TV			SUB TOTAL			Child Care		
Rates/ Taxes			Transport Expenses			Child Support		
Furniture			Car Registration			Donations		
Appliances			Fuel			Subscriptions		
Groceries			Parking			Newspapers/magazines		
Gardening/Pool Care			Repairs/Maintenance			Movies & DVD's		
SUB TOTAL			Public Transport			Restaurant/Takeaway		
Education Expenses			SUB TOTAL			Alcohol & cigarettes		
School Fees			Medical Expenses			Pet Food		
University/TAFE/HECS			Doctor			Other pet costs		
Tuition			Medicine/Pharmacy			Gifts B'day/Xmas		
Books & Uniforms			Other Health Care			SUB TOTAL		
Camps/Excursions			Dentist					
Outside school activities i.e. dancing/footy etc			SUB TOTAL			TOTAL EXPENSES		
SUB TOTAL			Personal Expenses			TOTAL INCOME		
			Clothes and shoes					
			Hair and Beauty			TOTAL SURPLUS		
			SUB TOTAL					