

Your monthly snapshot

Enter estimated monthly amounts. Save a copy before closing your PDF viewer.

Monthly income

Employment income	\$
Pension / government benefits	\$
Investment or rental income	\$
Other income	\$

Monthly income total	\$
-----------------------------	----

Essential spending

Housing and utilities	\$
Groceries and household	\$
Transportation	\$
Health and insurance	\$

Essential spending total	\$
---------------------------------	----

Your monthly snapshot

Continue with flexible spending, commitments and future priorities.

Lifestyle spending

Dining and entertainment	\$
Travel and hobbies	\$
Gifts and giving	\$
Other discretionary spending	\$

Lifestyle spending total	\$
---------------------------------	----

Commitments and future

Debt payments	\$
Regular savings	\$
Retirement contributions	\$
Education or other goals	\$

Commitments and future total	\$
-------------------------------------	----

Your monthly snapshot

Monthly summary

Total monthly income

\$

Total monthly outflow

\$

Monthly difference

\$

Questions, priorities and notes

For general planning only. This worksheet does not account for tax treatment, timing differences or irregular expenses.