



The Road to Financial Success: You Drive We Navigate

BUDGET ANALYZER

CLIENT NAME:

DATE:

Note: Please only put a value in either the Monthly or Annual columns but not both. Please include items that you pay once a year or randomly throughout the year in the Annual Column.

	Actual Monthly	Monthly Goal	Actual Annual	Annual Goal
Housing				
Mortgage / Rent				
2nd Mortgage / HELOC				
HOA				
Repairs / Maintenance				
Home Insurance				
Property Taxes				
Other				
Utilities				
Electric				
Natural Gas				
Water				
Sewer				
Garbage				
Cable / Satellite				
Internet				
Phone				
Cell Phone				
Other				
Automotive				
Car Payment 1				
Car Payment 2				
Fuel				
Repairs / Maintenance				
Auto Insurance				
Other				
Food				
Groceries				
Dining-Out				
Other				

	Actual Monthly	Monthly Goal	Actual Annual	Annual Goal
Insurance				
Health				
Life				
Long Term Care				
Disability				
Umbrella / Liability				
Dental				
Other Insurance				
Debt				
Credit Card 1				
Credit Card 2				
Credit Card 3				
Motorcycle				
Recreational Vehicle				
Student Loans				
Other				
Other				
Miscellaneous				
Child Care				
Child Support / Alimony				
School Expenses				
Clothing				
Dr Visits / Co-Pays / Medical				
Prescriptions				
Household Goods				
Gym Memberships				
Subscriptions / Dues				
Fees				
Gifts				
Vacations				
Entertainment 1				
Entertainment 2				
Entertainment 3				
Federal Taxes				
State Taxes				
Other				
Other				
Other				
TOTAL				

GRAND TOTAL EXPENSES	MONTHLY	YEARLY
ACTUAL		
GOAL		
DIFFERENCE		

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