

Monthly Income and Expense Worksheet



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Your bank. For life.™

My Income		My Expenses	
		Fixed Expenses	
Wages	\$ _____	Rent / Mortgage	\$ _____
Public Assistance	\$ _____	Property Taxes/Insurance	\$ _____
Child Support/ Alimony	\$ _____	Trash Collection	\$ _____
Interest/Dividends	\$ _____	Cable	\$ _____
Social Security	\$ _____	Car Payment	\$ _____
Advanced Earned		Car Insurance	\$ _____
Income Credit	\$ _____	Other Loan Payments	\$ _____
_____	\$ _____	Health Insurance	\$ _____
_____	\$ _____	Day Care/Elder Care	\$ _____
		Savings	\$ _____
		_____	\$ _____
Total Income	\$ _____		
		Flexible Expenses	
		Gas/Oil	\$ _____
		Electricity	\$ _____
		Water	\$ _____
		Telephone/Cell Phone	\$ _____
Total Income	\$ _____	Food	\$ _____
Subtract: Total Expenses	\$ _____	Transportation/Gas	\$ _____
Equals: Surplus (Deficit)	\$ _____	Car Maintenance	\$ _____
		Education	\$ _____
		Personal Expenses	\$ _____
		Charity/Donations	\$ _____
		_____	\$ _____
		Total Expenses	\$ _____

Adapted from Old National Bank Real Life Finance financial education program.