

BUDGET WORKSHEET



LEVEL FOUR

Financial

A DIVISION OF
LEVEL FOUR GROUP, LLC

Prepared For: _____

Date: _____

Auto & Transport	Expected	Actual
Gas & Fuel	\$	
Rideshare	\$	
Parking	\$	
General	\$	
Auto Service	\$	
Other	\$	
Subtotal	\$	

Bills & Utilities	Expected	Actual
Phone, Internet & Cable	\$	
Energy, Gas, Electric	\$	
Garbage & Recycling	\$	
Sewer	\$	
Water	\$	
Other	\$	
Subtotal	\$	

Education	Expected	Actual
Tuition	\$	
Professional Development	\$	
Personal Development	\$	
Other	\$	
Subtotal	\$	

Entertainment	Expected	Actual
Concerts & Events	\$	
Hobbies	\$	
Subscriptions	\$	
Other	\$	
Subtotal	\$	

Food	Expected	Actual
Fast Food & Convenience	\$	
Restaurants & Dining	\$	
Groceries	\$	
Alcohol & Bars	\$	
Other	\$	
Subtotal	\$	

Gifts	Expected	Actual
Essential	\$	
Discretionary	\$	
Subtotal	\$	

Health & Fitness	Expected	Actual
Gym	\$	
Hair & Nails	\$	
Spa & Massage	\$	
Personal Care	\$	
Other	\$	
Subtotal	\$	

Home	Expected	Actual
Furniture & Home Décor	\$	
Household Services	\$	
Improvement & Projects	\$	
Maintenance	\$	
Supplies	\$	
Other	\$	
Subtotal	\$	

Insurance	Expected	Actual
Disability	\$	
Home	\$	
Life	\$	
LTC	\$	
Health	\$	
Umbrella	\$	
Auto	\$	
Whole Life	\$	
Other	\$	
Subtotal	\$	

Kids	Expected	Actual
Childcare & Daycare	\$	
Kids Clothing	\$	
Toys	\$	
Baby Supplies	\$	
Other	\$	
Subtotal	\$	

Loans	Expected	Actual
Auto	\$	
Other	\$	
Subtotal	\$	

Medical	Expected	Actual
Dentist	\$	
Doctor	\$	
Pharmacy	\$	
Vision	\$	
Other	\$	
Subtotal	\$	

Mortgage	Expected	Actual
Primary Residence	\$	
Other	\$	
Other	\$	
Subtotal	\$	

Pets	Expected	Actual
Pet Food	\$	
Pet Grooming	\$	
Veterinary	\$	
Other	\$	
Subtotal	\$	

Savings	Expected	Actual
Investment Savings	\$	
Retirement Savings	\$	
College Savings	\$	
Investment Savings	\$	
Other	\$	
Subtotal	\$	

Shipping & Handling	Expected	Actual
Shipping & Handling Expenses	\$	
Subtotal	\$	

Shopping	Expected	Actual
Shopping	\$	
Clothing	\$	
Electronics & Software	\$	
Sports & Hobbies	\$	
Books	\$	
Misc.	\$	
Other	\$	
Whole Life	\$	
Other	\$	
Subtotal	\$	

Taxes	Expected	Actual
SDI Tax	\$	
Social Security	\$	
State Tax	\$	
Federal Tax	\$	
Local Tax	\$	
Property Tax	\$	
Other	\$	
Subtotal	\$	

Travel & Vacation	Expected	Actual
Air Travel	\$	
Hotel	\$	
Rental Car	\$	
Other	\$	
Subtotal	\$	

Legal	Expected	Actual
Expenses	\$	
Subtotal	\$	

Misc.	Expected	Actual
	\$	
	\$	
	\$	
	\$	
Subtotal	\$	

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