

Household Financials

Date:

Homeowner(s) Names:

Homeowner A Occupation/Employer:

Homeowner B Occupation/Employer:

Monthly Income

	<u>Net</u>	<u>Gross</u>	COMMENTS
Homeowner (A) Employer 1			
Homeowner (A) Employer 2			
Homeowner (B) Employer 1			
Homeowner (B) Employer 2			
Other Employment Income			
Social Security/SSI/SSDI			
Child or Spousal Support			
Unemployment Compensation			
Workers Disability Compensation			
Veterans Benefits			
Retirement Benefits			
Monies From Rental Properties			
Household Members Over 18 Wages			
Food Stamps			
Governmental Income Assistance			
Child Care Assistance			
Other			
Other			

Assets/Liabilities

	<u>Current Value</u>	<u>Amount Owed</u>
Checking	_____	
Savings	_____	
Stocks/Bonds	_____	
401k/IRA	_____	
Home Mtge 1	_____	_____
Home Mtge 2	_____	_____
Auto 1	_____	_____
Auto 2	_____	_____
Rec. Vehicles	_____	_____
Cottage/Cabin	_____	_____
Other RE/Land	_____	_____

Monthly Expenses

	<u>Comments</u>		<u>Comments</u>
<u>Housing</u>		<u>Donations</u>	
1st Mortgage	_____	Religious/Charity	_____
2nd Mortgage	_____		
Homeowner's Ins (if not in mtg)	_____	<u>Clothing</u>	
Property Taxes (if not in mtg)	_____	Clothing	_____
HOA	_____	Laundry/dry cleaning	_____
Heating (gas/oil)	_____		
Electricity	_____	<u>Education</u>	
Water/Sewage	_____	Tuition	_____
Phone Service	_____	Books/papers/supplies	_____
Home Maintenance	_____	Newspapers/magazines	_____
Home Furnishings	_____	Lessons (sport,dance,music)	_____
Trash Service	_____		
Cleaning Supplies	_____	<u>Gifts</u>	
Lawn Service	_____	Birthdays	_____
		Major Holidays	_____
<u>Transportation</u>			
Gas	_____	<u>Personal</u>	
Car Payment	_____	Barber/Beauty Shop	_____
Car Insurance	_____	Toiletries	_____
Car Inspection	_____	Children's Allowances	_____
Repairs/Maintenance	_____	Tobacco & Alcohol	_____
Registration Fees	_____		
Public Transportation	_____	<u>Entertainment</u>	
Parking and Tolls	_____	Movies/Events/Concerts	_____
Other	_____	Video Rentals	_____
		Internet/TV Service	_____
<u>Insurance</u>		Restaurants/Take-out	_____
Health (if not payroll deducted)	_____	Gambling/Lottery Tickets	_____
Life	_____	Fitness/Social Clubs	_____
Disability	_____	Vacation/Trips	_____
Other	_____	Hobbies/Crafts	_____
<u>Medical</u>		<u>Miscellaneous</u>	
Doctor	_____	ATM/Bank Account Fees	_____
Dentist	_____	Pet Care & Supplies	_____
Prescriptions	_____	Postage	_____
		Pictures/Photo Processing	_____
<u>Childcare</u>		"Mad" Money	_____
Day Care/Babysitters	_____		
Child Support/Alimony	_____	<u>Debts</u>	
		Student Loans	_____
<u>Food</u>		Credit Card (monthly min)	_____
Groceries	_____	Credit Card (monthly min)	_____
School Lunches	_____	Credit Card (monthly min)	_____
Work Related (lunch/snacks)	_____	Medical Bills	_____
		Personal Loans	_____
<u>Other</u>	_____		
<u>Other</u>	_____		