

Monthly Expenses Worksheet		
Expense Type	Monthly Cost	Subtotals
Home		
Mortgage or Rent	\$	
Homeowners / Renters Insurance	\$	
Property Taxes	\$	
Home Repairs / Maintenance	\$	
Home Owner's Association Dues	\$	
Home Improvements	\$	
Home Subtotal		
Utilities		
Electricity	\$	
Water and Sewer	\$	
Natural Gas or Oil	\$	
Telephone (Land Line)	\$	
Telephone (Cell Phone)	\$	
Internet (Dial-up, Cable, DSL, etc.)	\$	
Utilities Subtotal		\$
Food		
Groceries	\$	
Eating Out, Lunches, Snacks	\$	
Food Subtotal		\$

Family Obligations		
Child Support	\$	
Alimony	\$	
Day Care, Babysitting	\$	
Family Obligations Subtotal		\$
Health & Medical		
Insurance (Medical, Dental, Vision, etc.)	\$	
Un-reimbursed Expenses, Co-pays	\$	
Fitness (Yoga, Massage, Gym)	\$	
Health & Medical Subtotal		\$
Transportation		
Car payments	\$	
Gasoline, Oil	\$	
Repairs, Maintenance, Fees	\$	
Insurance	\$	
Parking	\$	
Other (Tolls, Bus, Subway, Taxis)	\$	
Transportation Subtotal		\$

Debt Payments		
Credit Cards	\$	
Student Loans	\$	
Other Loans	\$	
Debt Payments Subtotal		\$

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Entertainment & Recreation		
Cable TV, Satellite, Movie Rentals, Movies	\$	
Computer Expenses	\$	
Hobbies	\$	
Subscriptions and Dues	\$	
Vacations	\$	
Entertainment & Recreation Subtotal		\$
Pets		
Food	\$	
Grooming	\$	
Boarding	\$	
Vet	\$	
Pets Subtotal		\$
Clothing		
Purchases	\$	
Dry Cleaning	\$	
Laundromat	\$	
Clothing Subtotal		\$
Investments & Savings		
401(K) or IRA	\$	
Stocks, Bonds, Mutual Funds	\$	
College Fund(s)	\$	
Savings	\$	
Emergency Fund	\$	
Investments & Savings Subtotal		\$
Miscellaneous		
Toiletries, Household Products	\$	

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Gifts / Donations	\$	
Grooming (Hair, Make-up, etc.)	\$	
Other Expenses (<i>Use additional sheets as needed</i>)	\$	
Miscellaneous Subtotal		\$
Total Monthly Expenses		\$
		x 12
Total Yearly Expenses		\$

Notes:

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The original version of this worksheet was provided by the National Center on Leadership for the Employment and Economic Advancement of People with Disabilities (LEAD).

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