



MONTHLY BUDGET WORKSHEET



GUARDIAN

WEALTH ADVISORY GROUP

INVESTMENTS | TAX | LEGAL | MEDICARE

Household	Monthly Amount
Mortgage - Principal & Interest	\$
Real Estate Taxes	\$
Homeowners Insurance	\$
Home Equity Loan	\$
Association Dues	\$
Rent	\$
Renters Insurance	\$
Utilities, Gas, Electric	\$
Water, Sewer	\$
Cable, Phone, Internet	\$
Maintenance, Improvement	\$
House Cleaning	\$
Other	\$
Other	\$
Total	\$

Daily Living	Monthly Amount
Food	\$
Dining Out	\$
Clothing	\$
Personal Care	\$
Other	\$
Other	\$
Total	\$

Entertainment	Monthly Amount
Parties, Events	\$
Sports, Hobbies, Lessons	\$
Membership Dues	\$
Vacation, Travel	\$
Other	\$
Other	\$
Total	\$

Other Notes:

Transportation	Monthly Amount
Auto Loans	\$
Auto Insurance	\$
Fuel	\$
Repairs	\$
Other	\$
Other	\$
Total	\$

Health	Monthly Amount
Health Insurance	\$
Prescriptions	\$
Life Insurance	\$
Long-Term Care Insurance	\$
Disability Insurance	\$
Veterinarian	\$
Other	\$
Other	\$
Total	\$

Debts & Obligations	Monthly Amount
Credit Cards	\$
Tuition, Student Loans	\$
Alimony, Child Support	\$
Other	\$
Other	\$
Total	\$

Miscellaneous	Monthly Amount
Charitable Donations	\$
Gifts	\$
Other	\$
Total	\$

The accuracy and completeness of this information is not guaranteed, as this summary reflects statements and information provided by you as a result of our initial meeting(s) and an initial examination of the current investments as you have disclosed them to us. The values represented in this report may not reflect the true original cost of the client's initial investment. Calculations and data provided should not be relied upon for tax purposes, original confirmations and 1099s should be used instead. Investment decisions should not be based solely on the information in this report. For fee-based accounts, the figures may or may not reflect the impact of advisory fees.

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