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	**$**

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	**$**

Other Notes:

GUARDIANWAG.COM

81 Market Street, Suite 5 | Elgin, IL 60123 | team@guardianwag.com | P: 847.741.2284 | F: 847.741.2398