

Personal	Financial (Concerns/Preferences/Goals)	Work
Current Financial Position	What You Own	What You Owe

BMT_ConsumerBudgetTool_0224 Internal Use Only

My Income (after taxes)

Budget Worksheet

Income/salary from all sources	
Investment Income	
Other Income	
Savings	
Total Monthly Income	

Customer Name:	
Date:	

My Monthly Expenses

Home	
Total Home	
Personal	

Personal	
Total Personal	

Food	
Total Food	
Auto/Transportation	
Total Auto/ Transportation	
Other Expenses	

Total Other Expenses

Health	
Total Health	

Entertainment & Recreation	
Total Entertainment Personal & Recreation	

Net Cash Flow	
Total Monthly Income	
- Total Monthly Expenses	
= My Net Cash Flow	
My Total Monthly Expenses	

My Total Monthly Expenses