



# South Texas Wealth Budget Checklist

## Income (take-home)

Income 1 \$ \_\_\_\_\_

Income 2 \$ \_\_\_\_\_

Income Total \$ \_\_\_\_\_

## Loans / Debt

Mortgage / Rent \$ \_\_\_\_\_

Credit Card \$ \_\_\_\_\_

Home Equity Loan \$ \_\_\_\_\_

Car Loan \$ \_\_\_\_\_

Student Loans \$ \_\_\_\_\_

Other loan debt repayment \$ \_\_\_\_\_

Total debt Expenses \$ \_\_\_\_\_

## Utilities

Gas/Oil \$ \_\_\_\_\_

Electricity \$ \_\_\_\_\_

Telephone \$ \_\_\_\_\_

Water and Sewer \$ \_\_\_\_\_

Television/Internet \$ \_\_\_\_\_

Other Utility Expense \$ \_\_\_\_\_

Total Utility Expenses \$ \_\_\_\_\_

## Insurance Premiums

Life \$ \_\_\_\_\_

Auto \$ \_\_\_\_\_

Home \$ \_\_\_\_\_

Health \$ \_\_\_\_\_

Supplemental \$ \_\_\_\_\_

Long Term Care \$ \_\_\_\_\_

Other Insurance Expense \$ \_\_\_\_\_

Total Insurance Expense \$ \_\_\_\_\_



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## Savings and investments

|                               |          |
|-------------------------------|----------|
| Emergency Fund                | \$ _____ |
| College Savings               | \$ _____ |
| Retirement (IRA, ect.)        | \$ _____ |
| Other Savings and Investments | \$ _____ |

Total Savings and Investment Expenses \$ \_\_\_\_\_

## Miscellaneous

|                                          |          |
|------------------------------------------|----------|
| Groceries                                | \$ _____ |
| Child Care                               | \$ _____ |
| Vacation                                 | \$ _____ |
| Entertainment (movies, dining out, ect.) | \$ _____ |
| Clothing                                 | \$ _____ |
| Gas (automobile)                         | \$ _____ |
| Commuting (parking ect.)                 | \$ _____ |
| Charitable Contributions                 | \$ _____ |
| Out-of-Pocket Medical Expenses           | \$ _____ |
| Other Expences                           | \$ _____ |

Total Miscellaneous Expenses \$ \_\_\_\_\_

## Totals

|                         |          |
|-------------------------|----------|
| Total Income            | \$ _____ |
| - Total Expenses        | \$ _____ |
| = Income Minus Expenses | \$ _____ |