

# Family Financial Management Worksheet

## Family Information

Family Name \_\_\_\_\_

Date \_\_\_\_\_

Prepared By \_\_\_\_\_

## Monthly Income

### Source

### Estimated Amount

e.g. Salary \_\_\_\_\_

e.g. Additional Income \_\_\_\_\_

Other \_\_\_\_\_

### Total Monthly Income

## Monthly Expenses

### Category

### Estimated Amount

Housing (rent/mortgage) \_\_\_\_\_

Utilities \_\_\_\_\_

Groceries \_\_\_\_\_

Transportation \_\_\_\_\_

Insurance \_\_\_\_\_

Healthcare \_\_\_\_\_

Education/Childcare \_\_\_\_\_

Entertainment \_\_\_\_\_

Savings/Investments \_\_\_\_\_

Debt Payments \_\_\_\_\_

Other \_\_\_\_\_

### Total Monthly Expenses

## Summary

Monthly Surplus/Deficit (Income - Expenses)

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## Notes/Goals

Enter notes, observations or financial goals here...