

Annual Household Financial Planning Sheet

Household Information

Household Name(s)	
Year	
Prepared By	
Date	

Estimated Annual Income

Source	Estimated Amount (\$)	Notes
Primary Employment		
Secondary Employment		
Investments/Dividends		
Other		
Total Estimated Income		

Estimated Annual Expenses

Category	Estimated Amount (\$)	Notes
Housing (Rent/Mortgage)		
Utilities		
Groceries		
Transportation		
Insurance		
Education		
Healthcare		
Childcare		
Entertainment		
Savings/Investment		
Other		
Total Estimated Expenses		

Summary

Item	Amount (\$)
Total Estimated Income	
Total Estimated Expenses	
Estimated Surplus/(Deficit)	

Additional Notes