

Detailed Personal Income Statement Worksheet

Personal Information

Name
Date
Period Covered (e.g., Month/Year)

Income

Source	Amount
Primary Salary/Wages	
Secondary Salary/Wages	
Bonuses/Commissions	
Investment Income (Dividends, Interest)	
Rental Income	
Other (describe)	
Total Income	

Expenses

Category	Amount
Housing (Mortgage/Rent)	
Utilities (Electricity, Water, Gas)	
Food/Groceries	
Transportation (Fuel, Public Transit)	
Insurance (Health, Car, Home)	
Medical/Healthcare	
Debt Payments (Loans, Credit Cards)	
Education	
Entertainment	
Savings/Investments	
Other (describe)	
Total Expenses	

Summary

Total Income
Total Expenses

Net Income (Income - Expenses)
