

Monthly Budget Planner

HOUSEHOLD ITEMS	Client 1 or joint	Client 2
Mortgage / Rent	£	£
Ground rent (if leasehold property)	£	£
Service charge (if leasehold property)	£	£
Council Tax	£	£
Water Rates	£	£
Gas, Electric and/or Fuel Oil total	£	£
Mobile Telephone	£	£
Home Telephone	£	£
Internet	£	£
TV package including Licence fee	£	£
Food shopping	£	£
Life insurance & other protection plans	£	£
Savings/Investment plans	£	£
Pension contributions	£	£
Building/contents insurance	£	£
Other (name type)	£	£
TRANSPORTATION		
Fuel	£	£
Car Tax	£	£
Car insurance	£	£
Servicing and maintenance	£	£
Breakdown cover	£	£
Public Transport	£	£
Other (name type)	£	£
MISCELLANEOUS		
Loans/HP/Rental agreements	£	£
Average monthly payment to Credit & Store Cards	£	£
Healthcare (dentist, medical care etc)	£	£
Newspapers / Subscriptions	£	£
Maintenance / Alimony	£	£
School Fees	£	£
Holidays	£	£
Clothing	£	£
Fun Money	£	£
Other (name type)	£	£
Total monthly expenditure (d):	£	(e) £
Total joint monthly expenditure (d + e) = (g):	£	
Total joint monthly NET income: (h)	£	
Total disposable income (h – g):	£	