

# MONEYMATTERS.LIFE



## Monthly Expenses by Category



Date: \_\_\_\_\_

### Housing

Mortgage, Rent, 2nd Mortgage, Home Equity Loan, Taxes, Repairs, HOA dues, Fees, Water Heater/HVAC Maintenance

### Utilities

Electricity, Gas, Water, Trash, Landline, Mobile Phone, Internet, Cable, Security System

### Food

Groceries, Restaurants, Fast Food, Snacks, Coffee, Baby Food, Formula, All edibles purchased online/not at grocery stores

### Transportation

Lease Payments, Vehicle Loan, Gas, Repairs, Tires, Registration, Car Replacement, Taxes

### Clothing

Adult Clothing, Children's Clothing, Dry Cleaning, Laundry

### Health

Medication, Co-Payments, Dentist, Chiropractor, Optometrist, Contact Lenses, Eyeglasses, Vitamins, Supplements,

## Monthly Expenses by Category Continued



### Charity

Monthly tithes, Charity, Donations,  
Sponsorships

### Savings

Monthly savings to emergency fund,  
retirement, college, vacation fund

### Insurance

Insurance: Life, Health, Home, Auto, Renter,  
Disability, Long Term Care, Identity Theft

### Entertainment

Subscriptions: Netflix, Hulu, Music Services,  
Streaming Media Services, Concerts, Movies,  
Dates, Books, Music, News, Magazines

### Fees

Break yearly fees into monthly amounts for Costco,  
Amazon Prime, any membership club, credit card  
yearly fees, Organization Dues, Licensing Fees

### Pets

Veterinarian, Food, Toys, Sanitation, Pet Sitters

## Monthly Expenses by Category Continued

3  
Page

### Fun Money

Amount you can spend per month  
however you wish

### Kids

Babysitter, Tuition, Field Trip Fees, Supplies, Class  
Funds, Afterschool Care, Gymnastics, Dance,  
Martial Arts, Sports, Music, Child Support

### Household Items

Decorations, Batteries, Stamps, Light Bulbs, Household  
Cleaning Supplies, Linens, Furniture, Trash Bags,  
Paper Towels, Landscaper, Housekeeper

### Gifts

Family Birthdays, Friends Birthdays, Flowers,  
Cards, Mother's/Father's Day, Valentines,  
Graduation, Teachers, Christmas

### Toiletries/Cosmetics

Cleaning Supplies for Laundry and Personal  
Grooming, Diapers, Wipes, Toilet Paper,  
Tissues, Lotions, Makeup, Hair Care, Waxing,  
Pedicures, Massage

### Debts

Alimony, Credit Cards, Student Loans,  
Personal Loans

# MONEYMATTERS.LIFE

Category Totals (Pages 1-3)

Housing

Entertainment

Utilities

Fees

4 Page

Food

Pets

Transportation

Fun Money

Clothing

Kids

Health

Household Items

Charity

Gifts

Savings

Toiletries/  
Cosmetics

Insurance

Debts

Total of All Monthly Expenses

# MONEYMATTERS.LIFE

Summary (Page 4)

Monthly Income

Monthly Expenses

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(Should Equal Zero)

Recommended Spending

Percentages

<input type="text" value="25-35%"/>	Housing	<input type="text" value="5-10%"/>	Entertainment
<input type="text" value="5-10%"/>	Utilities	<input type="text" value="-"/>	Fees
<input type="text" value="5-15%"/>	Food	<input type="text" value="-"/>	Pets
<input type="text" value="10-15%"/>	Transportation	<input type="text" value="-"/>	Fun Money
<input type="text" value="2-7%"/>	Clothing	<input type="text" value="-"/>	Kids
<input type="text" value="5-10%"/>	Health	<input type="text" value="-"/>	Household Items
<input type="text" value="10-15%"/>	Charity	<input type="text" value="-"/>	Gifts
<input type="text" value="10-25%"/>	Savings	<input type="text" value="-"/>	Toiletries/ Cosmetics
<input type="text" value="10-25%"/>	Insurance	<input type="text" value="5-10%"/>	Debts

5-10%

GOAL IS NO DEBT