

PARTICIPANT BUDGET/FINANCIAL SUMMARY

Name _____

Date _____

Income Sources	\$/month	\$/year	Expenses/Debts	\$/month	\$/year
Earned income for _____ (Name)			Rent or Home Mortgage		
Earned income for _____ (Name)			Renter's or Homeowner Insurance		
Earned income for _____ (Name)			Utilities (electric, gas, water, sewer, garbage)		
Earned income for _____ (Name)			Telephone (house, pager, cell)		
Child Support			Groceries & Household Supplies		
Alimony			Personal Insurance (health, life, etc.)		
Social Security			Car payments		
TANF/FIP			Car Maintenance (tags, gas, upkeep, repairs)		
Food Stamps			Car Insurance		
Investment/Dividends			Medical (doctor, dentist, medicine)		
Pension/Retirement			Child Care		
Other _____			Child Support/Alimony		
Other _____			Meals out/school lunches		
TOTAL Income:			Dry cleaning/Laundromat		
Total Income			Clothing		
			Entertainment		
	Total Expenses		Credit cards		
	Available for Savings		Other: _____		
			Other: _____		
		TOTAL Expenses:			

Explanations/Details: _____

PARTICIPANT SAVINGS GOAL

Name _____ Date _____

Asset Choice _____

Savings Period (months) _____

Month	Year 20__	Year 20__	Year 20__	Year 20__
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				
Yearly Totals				
Total Savings Goal \$				

Note: This chart represents your estimated savings deposits each month and does not include interest earned or match amounts.