

# Monthly Budget Planner

## Estimated Income

Sheet 1 of 2

HSP

Financial Planning

**CLIENT NAME**

**Date Completed**

INCOME RECEIVED	MAIN	SECOND		TOTAL
Employment or Profession				£
Basic Salary				£
Profits taken or received				£
Overtime				£
Commission				£
Other Income				£
<b>SUB TOTALS</b>				£

OTHER INCOMES				
State Pension				£
Work Pension				£
Investment Income				£
State Benefits				£
Maintenance / Alimony				£
Any Other				£
<b>SUB TOTALS</b>				£

**GRAND TOTALS**

**TOTAL MONTHLY NET INCOME**

£

**LESS TOTAL MONTHLY EXPENDITURE**

£

**TOTAL RESIDUAL INCOME**

£

**PLANNING  
TOMORROW  
TODAY**

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Financial Planning

# Monthly Budget Planner

## Estimated Monthly Expenditure

Sheet 2 of 2

HSP

Financial Planning

PERSONAL & HOUSEHOLD EXPENDITURE	PAYMENT DETAIL The Amount per Week or Month	MONTHLY COST
<b>DOMESTIC</b>		
Mortgage / Rent	.....	£
Mortgage Repayment Policy	.....	£
Mortgage Payment Protection policy	.....	£
Buildings & Contents Policy	.....	£
Council Tax	.....	£
Ground Rent / Service Charge - leasehold	.....	£
Gas	.....	£
Eectricity	.....	£
Water Rates	.....	£
Telephone LandLine / Broadband	.....	£
Mobile (s)	.....	£
Housekeeping - Food Shopping etc	.....	£
House Maintenance	.....	£
TV or Video Hire	.....	£
TV Licence	.....	£
<b>TOTAL DOMESTIC EXPENDITURE</b>		£
<b>PERSONAL EXPENSES</b>		
Life Insurance	.....	£
Pension Contributions	.....	£
Savings Plans	.....	£
Subscriptions - Personal or Professional	.....	£
Health Costs /Plans - Dentist Prescriptions	.....	£
Clothing , Shoes Etc	.....	£
School Fees or Expenses	.....	£
<b>TOTAL PERSONAL EXPENDITURE</b>		£
<b>TRANSPORT</b>		
Car Leasing or HP	.....	£
Petrol or Fares	.....	£
Road Tax, Insurance Servicing or Repairs	.....	£
<b>TOTAL TRANSPORT EXPENDITURE</b>		£
<b>LEISURE</b>		
Holidays	.....	£
Hobbies or Entertainment	.....	£
Special Occassions - Birthdays or Weddings	.....	£
<b>TOTAL LEISURE EXPENDITURE</b>		£
<b>FINANCE OR OTHER</b>		
Existing Regular Payments	.....	£
<i>Please Indicate Remaining Balance For Info £</i>	.....	
Other Payments 1	.....	£
Other Payments 2	.....	£
Other Payments 3	.....	£
<b>TOTAL FINANCE &amp; OTHER EXPENDITURE</b>		£
<b>TOTAL MONTHLY EXPENDITURE</b>		£