

Personal Annual Budget

For the Year:

1. Personal Information

- Name: _____
- Address: _____
- Phone Number: _____
- Email: _____

2. Income

Category	Monthly Amount	Annual Amount
Salary/Wages	\$ _____	\$ _____
Bonuses	\$ _____	\$ _____
Freelance/Side Jobs	\$ _____	\$ _____
Investments (Dividends, etc.)	\$ _____	\$ _____
Rental Income	\$ _____	\$ _____
Other	\$ _____	\$ _____
Total Income \$ _____		

3. Expenses

A. Fixed Expenses

Category	Monthly Amount	Annual Amount
Mortgage/Rent	\$ _____	\$ _____

Property Taxes	\$ _____	\$ _____
Homeowners/Renters Insurance	\$ _____	\$ _____
Utilities (Electricity, Water, etc.)	\$ _____	\$ _____
Car Payment	\$ _____	\$ _____
Car Insurance	\$ _____	\$ _____
Health Insurance	\$ _____	\$ _____
Life Insurance	\$ _____	\$ _____
Subscriptions (Streaming services, etc.)	\$ _____	\$ _____
Other	\$ _____	\$ _____
Total Fixed Expenses \$ _____		

B. Variable Expenses

Category	Monthly Amount	Annual Amount
Groceries	\$ _____	\$ _____
Dining Out	\$ _____	\$ _____
Gas/Transportation	\$ _____	\$ _____

Entertainment	\$ _____	\$ _____
Clothing	\$ _____	\$ _____
Medical/Dental	\$ _____	\$ _____
Personal Care (Haircuts, etc.)	\$ _____	\$ _____
Gifts/Donations	\$ _____	\$ _____
Travel/Vacation	\$ _____	\$ _____
Miscellaneous	\$ _____	\$ _____
Total Variable Expenses \$ _____		

C. Savings & Investments

Category	Monthly Amount	Annual Amount
Emergency Fund	\$ _____	\$ _____
Retirement (401(k), IRA, etc.)	\$ _____	\$ _____
Education Fund	\$ _____	\$ _____
Investments	\$ _____	\$ _____
Other Savings	\$ _____	\$ _____

Total Savings & Investments || \$_____ |

4. Summary

Category	Monthly Amount	Annual Amount
Total Income	\$_____	\$_____
Total Fixed Expenses	\$_____	\$_____
Total Variable Expenses	\$_____	\$_____
Total Savings & Investments	\$_____	\$_____

Net Income (Total Income - Total Expenses - Total Savings & Investments): || \$_____ |

Signature

I certify that the above information is true and accurate to the best of my knowledge.

Signature: _____

Date: _____