



MONEY BASICS

Workshop 3: Worksheets

Gathering Income:

Source:	Monthly Income:
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
Total:	\$

Gathering Expenses

Regular Expenses:		Monthly Expenses:	
Type:	Amount:	Type:	Amount:
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
Total:	\$	Total:	\$

Separating Expenses into Needs vs. Wants

Needs	Annual Cost	Wants	Annual Cost
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
Total	\$	Total	\$

Maslow's Hierarchy of Needs

Maslow's Need:	Specific Need:	Cost:
Physiological		
Safety		
Belonging-Love		
Self-esteem		
Self-actualization		
Total Cost:		

Basic Budgeting Worksheet

CATEGORY	BUDGET AMOUNT	ACTUAL AMOUNT	DIFFERENCE
Spendable Income:			
Expenses:			
Rent or Mortgage			
Electricity			
Natural Gas or Oil			
Water and Sewer			
Garbage & Recycling services			
Phone(s)			
Internet			
Cable/Satellite			
Subscriptions (Netflix, Spotify, Amazon etc.)			
Credit Card Payments			
Other Loan Payments			

Transportation (Bus Pass or Gas for Car)			
Childcare			
Insurance (Auto, Health, Home, Life)			
Out of Pocket Medical Expenses			
Groceries			
Toiletries/Household Goods			
Pet Care/Food			
Dining Out			
Entertainment			
Other Expenses:			
Total			