



# FINANCIAL ASSESSMENT WORKSHEET

## Average Monthly Income

	Individual #1	Individual #2
Gross Monthly Income (wages)	_____	_____
Net Monthly Income (take home wages)	_____	_____
Child Support	_____	_____
Part-time Income	_____	_____
Tips/bonuses	_____	_____
Unemployment	_____	_____
Assistance (food, cash, other)	_____	_____
Other	_____	_____

## Average Monthly Expenses

Fixed Expenses	Variable Expenses
_____ Rent/Mortgage	_____ Groceries
_____ Car Payment #1	_____ Toiletries
_____ Car Payment #2	_____ Utilities
_____ Insurance	_____ Telephone
_____ Child Support	_____ Cell Phone
_____ Child Care	_____ Gasoline
_____ Student Loan(s)	_____ Donations
_____ Ready Reserve	_____ Eating Out
_____ Cable TV	_____ Movies/Netflix
_____ Internet Services	_____ Hobbies
_____ Prescriptions	_____ Alcohol
_____ Fitness Membership	_____ Cigarettes/tobacco
_____ Credit Card Payment(s)	_____ Gambling
	_____ Personal Grooming
	_____ Laundry/dry cleaning

## Periodic Expenses - *Estimated Annual Expenses for next 12 months*

_____ Property Taxes (if not escrowed)
_____ Home Maintenance (lawn care, repairs, misc)
_____ Car Maintenance/License (tabs,oil, repairs, washes, misc)
_____ Insurance (if not paid monthly)
_____ Medical (not covered by insurance-eye, dental, co-pays)
_____ Clothing
_____ Education (lunch, tuition, etc)
_____ Gifts (birthday,holiday, etc)
_____ Vacations/Travel
_____ Propane/Fuel Oil
_____ Children's Activities
_____ Other
_____ Pets