

Monthly Budget Planner

Estimated Income

Sheet 1 of 2

HSP

Financial Planning

CLIENT NAME

Date Completed

INCOME RECEIVED	MAIN	SECOND		TOTAL
Employment or Occupation				£
Basic Salary				£
Self-employed /Business Income				£
Overtime				£
Commission				£
Other Income (e.g. freelance, side income)				£
SUB TOTALS				£

OTHER INCOMES				
State Pension				£
Work Pension				£
Investment Income				£
Benefits (e.g. Universal Credit, Child Benefit)				£
Maintenance / Alimony				£
Other (please specify)				£
SUB TOTALS				£

GRAND TOTALS

TOTAL MONTHLY NET INCOME

£

LESS TOTAL MONTHLY EXPENDITURE

£

TOTAL RESIDUAL INCOME

£

**PLANNING
TOMORROW
TODAY**

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HSP
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
DOMESTIC		
Mortgage / Rent	£
Mortgage (Repayment / Interest Only)	£
Income Protection / Mortgage Protection	£
Buildings & Contents Policy	£
Council Tax	£
Ground Rent / Service Charge - leasehold	£
Gas	£
Electricity	£
Water Rates	£
Broadband / Landline / Home Internet	£
Mobile Phone(s)	£
Food & Household Expenses	£
House Maintenance	£
Streaming Services (Netflix, Sky, etc)	£
TV Licence / Media Licence	£
TOTAL DOMESTIC EXPENDITURE		£
PERSONAL EXPENSES		
Life Insurance	£
Pension Contributions	£
Savings / Investments	£
Subscriptions (Gym, Apps, Professional etc)	£
Health Care (Dental, Prescriptions, Insurance)	£
Clothing & Personal Items	£
Education & Childcare (School fees, nursery fees)	£
TOTAL PERSONAL EXPENDITURE		£
TRANSPORT		
Car Finance / Lease / HP	£
Fuel / Public Transport / Travel Costs / Parking	£
Vehicle Costs (Tax, Insurance, Servicing, Repairs)	£
TOTAL TRANSPORT EXPENDITURE		£
LEISURE		
Holidays	£
Entertainment & Leisure (days out, activities, etc)	£
Special Occassions (Birthdays, Weddings, Events)	£
TOTAL LEISURE EXPENDITURE		£
FINANCE OR OTHER		
Debt Repayments (Loans, Credit Cards etc)	£
<i>Outstanding Debt Balances (for information only)</i>	
Other Payments 1	£
Other Payments 2	£
Other Payments 3	£
TOTAL FINANCE & OTHER EXPENDITURE		£
TOTAL MONTHLY EXPENDITURE		£