



Eastwood

WEALTH MANAGEMENT

Monthly Budget

Giving

Housing

- Mortgage _____
- Insurance & Taxes _____
- Repairs & Maintenance _____
- HOA _____
- Electricity _____
- Water _____
- Home/Cell Phone _____
- Trash _____
- Cable/Internet _____

Food

- Groceries _____
- Eating Out _____

Transportation

- Car Payment _____
- Gas _____
- Repairs & Maintenance _____
- Car Insurance _____

Clothing

Personal

- Child Care _____
- Hobbies _____
- Travel _____
- Entertainment _____
- Family/Friends _____
- Miscellaneous _____

Insurance

- Healthcare/Prescriptions _____
- Disability _____
- Life _____
- Long-Term Care _____

Other

Total Expenses _____

Total Gross and Net Monthly Income _____

Please total any future significant expenditures
(Ex. Roof, Heating/Air unit, Car, etc.) _____