

First, add up your expenses each month. Subtract that total from your total income to see the difference. You may want to allocate what is left toward savings or a retirement plan, and you may find that you need to trim your budget elsewhere.

**TOTAL INCOME PER MONTH:**

Salary:

Dividends:

Interest:

Other Income:

**TOTAL:** \_\_\_\_\_**TOTAL EXPENSES PER MONTH:**Home

Rent/Mortgage:

Taxes, insurance:

Repairs, maintenance:

Association fees:

Other:

Utilities

Electric:

Gas:

Water, sewer, recycling:

Phone (landline):

Phone (cellular):

Cable or satellite:

Internet Access:

Other:

Transportation

Car Payment 1:

Car Payment 2:

Car Payment 3:

Fuel:

Car Insurance for all vehicles:

Repairs, maintenance:

Bus, train, taxi, parking, subway:

Other:

Insurance

Health insurance:

Life Insurance:  
Disability Insurance:  
Homeowner's Insurance (if not included in your monthly mortgage):  
Mortgage Insurance (if applicable and not included in mortgage):  
Other:

#### Debts

Credit card 1;  
Credit card 2:  
Credit card 3:  
Credit card 4:  
Student loans:  
Private loans:  
Other:

#### Food

Groceries:  
Eating Out (including coffee runs, ice cream shops, etc):

#### Household

Day Care:  
Child Support:  
Alimony:  
School Tuition:  
School supplies:  
Activity supplies and fees (sports, etc.):  
Music or other lessons:  
Supplies (cleaning, etc):  
Other:

#### Personal Care

Hair Cuts/Colors/etc:  
Other services (massage, nail care, etc.):  
Prescription Medications:  
Toiletries:  
Clothing:  
Medical co-pays and fees:  
Other:

#### Pets

Food and supplies:  
Vet visits:  
Grooming:  
Medicine:  
Other:

Entertainment

Events (concerts, etc.):

Movies (renting or theater):

Hobbies:

Reading materials (subscriptions, etc):

Music purchases:

Other:

Miscellaneous

Retirement contributions and/or Savings:

Charitable gifts:

Gifts to others:

Art/Decorations:

Misc. Services (dry cleaning, tailor, etc):

Travel (airfare, hotel, etc):

Special events (birthdays, anniversaries, etc.):

**Total Income:**

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**Total Expenses:**

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**Amount left over:**

The contents of this checklist are intended to provide helpful suggestions to a family member or other survivor who has assumed the duties of concluding the affairs of a loved one/decedent. The list is not intended to be exhaustive. It is not intended to provide legal or financial advice nor to be relied on in lieu of such services. If you have specific questions relating to an estate you are handling, you may find it helpful to consult with a probate attorney or financial professional.