Budgeting and Personal Finances

Use this worksheet to participate in budgeting and setting goals for managing your monthly finances.

My Goals
Some ways I would like to participate in my personal finances are:

I would like to:
☐ Learn how to prepare a monthly budget
☐ Learn how to write checks and balance my account
☐ Work together with a loved one or member of my treatment team on my monthly finances

Learn to manage my personal finances myself in:
☐ 3 months ☐ 6 months ☐ One year

Learning how to budget can help me to:

My biggest concern about learning to manage my finances is:

Some of my financial goals are:
☐ Getting a job/earning money
☐ Opening a bank account of my own
☐ Learn how to pay my bills with checks or using online bill pay
☐ Saving to buy something special for me/a gift for someone

name of item: cost:

name of item: cost:

name of item: cost:

Preparing a Budget
A budget is an important tool to help you manage your finances. It is a guide that shows what money you plan on spending to cover your expenses and where that money will come from. The two main parts of a budget are your income and your expenses. (See chart on back).
# Budgeting and Personal Finances

## My Monthly Budget

<table>
<thead>
<tr>
<th>Income</th>
<th>Expenses</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Wages</td>
<td>$</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disability Insurance</td>
<td>$</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Security Supplemental</td>
<td>$</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Family Allowance</td>
<td>$</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td>$</td>
<td>$</td>
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<tr>
<td>Other:</td>
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</tr>
<tr>
<td>Other:</td>
<td>$</td>
<td>$</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Total Income | $ | Total Expenses | $ |

## My Monthly Income and Expenses

**My Monthly Income Is** $______________

**MINUS**

**My Total Monthly Expenses Are** $______________

**Remaining Money/Deficit** +/- $______________

## Sample Check

John Doe  
99 Lark Lane  
Jonesville, NY 66775

Pay to the order of Electric Company $100

One hundred and 00/100

Date 1/31/15

Check # 151

Sign here

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