

# Financial Health Check Monthly Budget Worksheet



FirstCaribbean  
International Bank

## Estimate Your Budget

Income and Other Money In	(Enter Estimates)	(Adjust if Needed)	(Totals will Auto-Calculate)
1. My Pay (After Tax)	_____	_____ x a Month	= _____
2. My Partner's Pay (After Tax)	_____	_____ x a Month	= _____
3. Other Income (After Tax)	_____	_____ x a Month	= _____
		<b>Total Money In</b>	_____

Spending and Savings	(Enter Estimates)	(Adjust if Needed)	(Totals will Auto-Calculate)
<b>HOME, BILLS &amp; UTILITIES</b>	Rent/Mortgage	_____	_____ x a Month = _____
	Gas	_____	_____ x a Month = _____
	Water	_____	_____ x a Month = _____
	Waste	_____	_____ x a Month = _____
	Electric	_____	_____ x a Month = _____
	Cable/Internet/Phone	_____	_____ x a Month = _____
	Other (renter's insurance, property tax, etc.)	_____	_____ x a Month = _____
<b>AUTO &amp; TRANSPORT</b>	Car loan	_____	_____ x a Month = _____
	Car insurance	_____	_____ x a Month = _____
	Car License and Inspection Fees/Road tax	_____	_____ x a Month = _____
	Gas and other transit (e.g., taxis)	_____	_____ x a Month = _____
	Transportation passes	_____	_____ x a Month = _____
<b>FOOD &amp; DINING</b>	Groceries	_____	_____ x a Month = _____
	Eating out (including lunches, coffee, etc.)	_____	_____ x a Month = _____
<b>FAMILY &amp; PERSONAL CARE</b>	Kids	_____	_____ x a Month = _____
	Pets	_____	_____ x a Month = _____
	Household goods	_____	_____ x a Month = _____
	Dry cleaning/laundry	_____	_____ x a Month = _____
	Personal Grooming (hair, nails, etc.)	_____	_____ x a Month = _____
	New clothing and shoes	_____	_____ x a Month = _____
	Health & fitness (gym, medication, etc.)	_____	_____ x a Month = _____
	Medical Insurance	_____	_____ x a Month = _____
	Life or other insurance	_____	_____ x a Month = _____
School costs (supplies, tuition)	_____	_____ x a Month = _____	

**Spending and Savings**

(Enter Estimates)

(Adjust if Needed)

(Totals will Auto-Calculate)

ENTERTAINMENT  
& SHOPPING

Amusement (movies, concerts)	_____	_____ x a Month	=	_____
Subscriptions (news, music, etc.)	_____	_____ x a Month	=	_____
Gifts and donations (weddings, birthdays)	_____	_____ x a Month	=	_____
One-off purchases (repairs, electronics)	_____	_____ x a Month	=	_____

Do you have any **monthly loans** we haven't covered yet?

Pay to	_____	My monthly payment	_____
	_____		_____
	_____		_____

Any other **monthly** expenses to add?

(Enter Estimates)

(Adjust if Needed)

(Totals will Auto-Calculate)

Other	_____	_____ x a Month	=	_____
Other	_____	_____ x a Month	=	_____

Any expenses you'd like to calculate **annually**?

Travel and vacation	_____	_____ x a Month	=	_____
Other	_____	_____ x a Month	=	_____
Other	_____	_____ x a Month	=	_____

Do you transfer any of your take-home pay to other accounts (e.g., separate savings account)?

Savings transfer#1	_____	_____ x a Month	=	_____
Savings transfer#2	_____	_____ x a Month	=	_____

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Monthly Income	-	Monthly Spending and Savings	=	Monthly Cash Available
_____		_____		_____

Notes:

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