

INCOME & EXPENSE COLLECTION FORM

(Please Print VERY Clearly)

Name: _____

Address: _____

Your Occupation: _____

Phone number(s): _____

Income Information

Take Home (net) pay \$ _____

During the month please circle how often you receive this pay [weekly, every-2-weeks, monthly, or twice-a-month]

Other (net) income \$ _____ from what source _____

During the month please circle how often you receive this pay [weekly, every-2-weeks, monthly, or twice-a-month]

Other (net) income \$ _____ from what source _____

During the month please circle how often you receive this pay [weekly, every-2-weeks, monthly, or twice-a-month]

Please make additional copies of this form if you have more income or expense sources to list.

Expenses

<u>List MONTHLY Cost</u>	<u>List</u> <u>Amount Owed</u>	<u>How</u> <u>Often Due</u>	<u>Balance</u> <u>Remaining</u>
Rent/ Mortgage	\$ _____	monthly	xxxxx
Utilities(Elec/Gas)	_____	monthly	xxxxx
Home Phone	_____	_____	xxxxx
Cell Phone	_____	_____	xxxxx
Food	_____	_____	xxxxx
Car Note	_____	_____	\$ _____
Car Note	_____	_____	\$ _____
Car Insurance	_____	_____	\$ _____
Other: (name bill)	_____	_____	\$ _____
Other (_____)	_____	_____	\$ _____
Other (_____)	_____	_____	\$ _____
Other (_____)	_____	_____	\$ _____
Other (_____)	_____	_____	\$ _____
Other (_____)	_____	_____	\$ _____
Other (_____)	_____	_____	\$ _____

<u>Credit Cards</u>	<u>Name of Card</u> <u>List Store, or Bank name</u>	<u>Interest</u> <u>Rate</u>	<u>Monthly</u> <u>Payment</u>	<u>Balance due</u> <u>Remaining</u>	<u>Card's</u> <u>Credit Limit</u>
Card #1	_____	% _____	\$ _____	\$ _____	\$ _____
Card #2	_____	% _____	\$ _____	\$ _____	\$ _____
Card #3	_____	% _____	\$ _____	\$ _____	\$ _____
Card #4	_____	% _____	\$ _____	\$ _____	\$ _____

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Savings-Investments

	<u>Balance</u>	<u>Interest Rate</u>	
Savings Account	\$ _____	_____ %	Fees paid on this acct \$ _____
Savings Account	\$ _____	_____ %	Fees paid on this acct \$ _____
Checking Account	\$ _____	_____ %	Fees paid on this acct \$ _____

	<u>Balance/ Value</u>	
Credit Union	\$ _____	
Savings plan @ work	\$ _____	What type of account is this (401k, IRA, other?) _____
Mutual Funds	\$ _____	
Stock	\$ _____	
Savings Bonds	\$ _____	
Other (_____)	\$ _____	
Other (_____)	\$ _____	Amount of your last tax refund \$ _____
Life Insurance (loan values)	\$ _____	

Weekly Expenses / Habits / Lifestyle

List all your weekly spending and entertainment costs (transportations, lunch, movies, shopping, etc.)

Example

<u>Activity</u>	<u>Frequency</u>	<u>Cost</u>
Lunch at work	Daily	\$8 a day
Clothes shop	once a month	\$150 a month
Gasoline purchase	weekly	\$50 a week

<u>Activity</u>	<u>Frequency</u>	<u>Cost</u>
1. _____		
2. _____		
3. _____		
4. _____		
5. _____		
6. _____		
7. _____		

Other Information

Please remember to include transportation cost to /from work. Below, please provide any other information that you would like to, or have been, partaking in on a less frequent basis. Travel for example.
