

# Planning Analysis

## Monthly Income (Net Take-Home Pay)



**Instructions: Please fill out form with pencil. Do not fill in shaded areas.**  
**If amounts are weekly, multiply by 4.3; if bi-monthly by 2.15**

	Amount	Overtime	2nd Job	Pension	Other	TOTAL
<b>a. Self Salary</b>						
<b>b. Spouse Salary</b>						
<b>cf. Other</b>						
<b>Total Monthly Income</b>						

## Monthly Expenses

<b>a. Giving</b>	Tithes	Offerings	Other			
<b>b. Housing</b>	Mortgage/Rent	Dues	Property Tax	Insurance	Repr/Maint	
<b>c. Utilities</b>	Gas/Electric	Water/Garbage	Phone and cell	Alarm	Cable	
<b>d. Food</b>	Groceries	Eating Out	Lunch:School	Lunch:Work	Other	
<b>e. Car</b>	Gas	License/Inspect	Insurance	Maintenance	Payment	
<b>f. Insurance</b>	Life	Medical	Dental	Other		
<b>g. Clothing</b>	Self	Spouse	Children			
<b>h. Savings/Investments</b>	Savings	Mutual Fund	IRA	Annuities	401k	
<b>i. Medical/Dental</b>	Doctor	Dentist	Prescription	Eye	Vitamins	
<b>j. School/Child Care</b>	Tuition	Child Care	Lessons	Member Dues		
<b>k. Miscellaneous</b>	Child Support	Alimony	Pets	Subscriptions	Internet Fee	
<b>l. Gifts</b>	Christmas	Birthday	Baby/Wedding	Anniversary	Other Gifts	
<b>m. Personal Care</b>	Cosmetics	Toiletries	Haircuts	Laundry/Clean	Other	
<b>n. Entertainment</b>	Movies	Baby Sitting	Activities	Vacation	Other	
<b>o. Other</b>						
<b>TOTAL EXPENSES</b>						
<b>AVAILABLE FOR DEBT PAYOFF</b>						

## Assets and Liabilities

Item	Value	Amount Owed	
<b>Home</b>			
<b>Vehicles</b>			
<b>R/V's, Boats, Etc</b>			
<b>Other real estate</b>			
<b>Savings, Stocks &amp; Bonds</b>			
<b>Other</b>			
<b>Total</b>			