

# Veteran Case Management Budget Sheet

INCOME SOURCE	FREQUENCY	AMOUNT

**TOTAL:**

Do the expenses exceed the income?

☐ Yes

☐ No

EXPENSES	FREQUENCY	AMOUNT
Rent		
Electric		
Water		
Gas		
Phone		
Transportation (car payment, car insurance, gas, public trans)		
Cable/Internet		
Other (Childcare, Credit Card, Loans)		
MISC (spending money)		

**TOTAL:**

Briefly describe a budget plan for future months.

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Would you be interested in FREE financial classes? ☐ Yes ☐ No

# How to make a monthly budget: 5 steps

1. Calculate your monthly income. The first step is to determine how much money you make each month.
2. Track your spending. The second step is to acknowledge your monthly expenses.
3. Think about your financial priorities. During the third step, separate your wants from your needs.
4. Design your budget. The fourth step is where you determine how to allocate your money between your savings, needs, and wants.
5. Track your spending and refine your budget as needed. Review your budget regularly and adjust as needed. Consistency is key.

“Budgeting isn’t about limiting yourself – it’s about making the things that excite you possible.”