#  Veteran Case Management Budget Sheet

Do the expenses exceed the income?

Yes

No

**INCOME**

**SOURCE**

**FREQUENCY**

**AMOUNT**

**TOTAL:**

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**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

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The Fund for Veterans’ Assistance provides grants to organizations serving Veterans and their families. For more information, visit www.tvc.Texas.gov.

**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.”