

# COPPERLINE

WEALTH MANAGEMENT & PLANNING

## BUDGET WORKSHEET

MONTH & YEAR

HOUSING	Expected	Actual
Mortgage/Rent		
Electricity		
Natural Gas/Propane		
Internet		
Cable		
Water		
Trash		
Maintenance		
HOA		
Other		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

LIVING EXPENSES	Expected	Actual
Groceries		
Household Goods		
Cell Phone		
Clothing		
Pet Care		
Water		
Personal Services (hair, dry cleaning)		
Childcare		
Other		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

AUTO EXPENSES	Expected	Actual
Car Payment		
Gasoline		
Maintenance		
Car Insurance		
Other		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

MEDICAL/HEALTH	Expected	Actual
Doctors Visits		
Prescriptions		
Eyecare		
Dental		
Other		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

MISCELLANEOUS	Expected	Actual
Gym/Club Memberships		
Entertainment		
Subscriptions		
Travel (monthly savings)		
Tithe		
Donations		
Other		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

INSURANCE EXPENSES	Expected	Actual
Health		
Homeowner's/Rentor's		
Life		
Identity Theft		
Long Term Care		
Other		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

DEBT	Expected	Actual
Credit Card 1		
Credit Card 2		
Credit Card 3		
Personal Loan		
Other		
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

<b>MONTHLY INCOME</b>		<b>MONTHLY EXPENSES</b>		<b>MONTHLY SAVINGS</b>	
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Sara Schauer mann and Luke McNeely are Registered Representative with Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Level Four Advisory Services LLC, a registered investment advisor. Copperline Wealth Management and Planning, and Level Four Advisory Services, LLC are separate entities from LPL Financial.