



MOMENTOUS

WEALTH ADVISORS

BUDGETING WORKSHEET

NEEDS

RENT/MORGAGE _____ / mo

UTILITIES _____ / mo

FOOD/GROCERIES _____ / mo

HOUSEHOLD MAINTENANCE _____ / mo

INTERNET _____ / mo

CELL PHONE _____ / mo

CAR PAYMENTS _____ / mo

CAR INSURANCE _____ / mo

MEDICAL/HEALTH _____ / mo

ASSOCIATION DUES _____ / mo

LIFE INSURANCE PREMIUMS _____ / mo

FITNESS MEMBERSHIPS _____ / mo

EMERGENCY FUND _____ / mo

LTC PREMIUMS _____ / mo

OTHER EXPENSES _____ / mo

TOTAL NEEDS EXPENSES _____ / mo

WANTS

ENTERTAINMENT _____ / mo

DINING OUT _____ / mo

TRAVEL _____ / mo

OTHER _____ / mo

TOTAL WANTS _____ / mo

WISHES

CHARITY/DONATIONS _____ / mo

HELPS KIDS/GRANDKIDS _____ / mo

OTHER _____ / mo

TOTAL WISHES _____ / mo

About Momentous Wealth Advisors

Whether you want to retire early, help your kids or grandkids with college, or leave a legacy, every decision you make, is significant on the future for you and your family. We look at your complete financial picture, which includes wealth management, budgeting, insurance, tax planning and estate planning. Our goal is to make sure you feel all taken care of with respect to your overall plan and help you make important financial decisions throughout your life.

Get in touch at:

www.momentouswealthadvisors.com



A Fee-Only Registered Advisory Firm

Disclaimer: The above budgeting worksheet is a good start to accessing your financial needs, wants and wishes. It does not constitute investment, tax, or estate planning advice. Please consult with a qualified financial advisor.

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