



Personal Budget Calculator Template

Name of applicant:

As at Date:

Assets	Estimated Value	Monthly Return/Income*	Total Income
Home	\$	\$	\$
Holiday Home	\$	\$	\$
Rental Property	\$	\$	\$
Other Property	\$	\$	\$
Motor Vehicles:			
1.	\$	\$	\$
2.	\$	\$	\$
3.	\$	\$	\$
Boat	\$	\$	\$
Caravan	\$	\$	\$
Other Plant/Equipment	\$	\$	\$
Furniture	\$	\$	\$
Jewellery	\$	\$	\$
Shares	\$	\$	\$
Managed Investments	\$	\$	\$
Term Deposits	\$	\$	\$
Other Bank Accounts	\$	\$	\$
Other Assets	\$	\$	\$
a. Sub-total	\$	\$	\$
	Claimant	Partner	Total
Wages (Monthly Gross)	\$	\$	\$
Pensions	\$	\$	\$
Other Benefits	\$	\$	\$
Other Income	\$	\$	\$
b. Sub Total	\$	\$	\$
c. Total Income (a + b)	\$	\$	\$

* Monthly Income = Estimated 12 months earnings divided by 12



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Liabilities	Estimated Value	Monthly Repayments	Total Expenses
Mortgages	\$	\$	\$
Investment Loans	\$	\$	\$
Personal Loans	\$	\$	\$
Rent/Board	\$	\$	\$
Building Maint/Repair	\$	\$	\$
Vehicles & Equipment			
- Maint/Repairs	\$	\$	\$
- Fuel	\$	\$	\$
- Registration/License	\$	\$	\$
Insurance			
- Building/Contents	\$	\$	\$
- Vehicles/Equipment	\$	\$	\$
- Medical	\$	\$	\$
- Life	\$	\$	\$
- Other	\$	\$	\$
Utility Costs			
- Water	\$	\$	\$
- Power	\$	\$	\$
- Gas	\$	\$	\$
- Rates	\$	\$	\$
- Phone	\$	\$	\$
- Internet	\$	\$	\$
Investments – Fees	\$	\$	\$
Medical/Dental/Chemist	\$	\$	\$
Education (Fees, Books, etc)	\$	\$	\$
Food/Clothing	\$	\$	\$
Other Household Costs	\$	\$	\$
Sport	\$	\$	\$
Social/Entertainment	\$	\$	\$
Other Expenses	\$	\$	\$
d. Total Liabilities	\$	\$	\$

Summary

c. Total Assets	\$	Total Income	\$
d. Total Liabilities	\$	Total Expenses	\$
Net Assets Less Liabilities	\$	Income Less Expenses	\$