



Amerisal Financial, Inc.
www.amerisalfinancial.com

MAKING BUDGETING FUN!!

Lucia Reynolds
LReynolds@scfinc.com
503-344-4422

YOUR NAME:			Date:		
MONTHLY INCOME					
Wages & Bonuses	\$	Dividends from investments	\$	Alimony/Child Support	\$
Self-employment income	\$	Interest Income	\$	Annuity Income	\$
Real Estate Income	\$	Pension income	\$	Gifts Received	\$
Royalties	\$	Other income	\$	Taxable Benefits	\$
				Total Income:	\$ -
MONTHLY EXPENSES					
Mortgage payment or Rent	\$	Home Maintenance	\$	Food - Groceries	\$
Home EqLine /2nd Mortgage	\$	Vac./Rental Maintenance	\$	Food - Restaurants/Coffee Out	\$
Real Estate Taxes	\$	Minor Home Improvements	\$	Food Total	\$ -
Home Owners Assoc.	\$	Home Cleaning Service	\$		
Home Insurance	\$	Landscaping, Tree Care	\$	Child Care, Babysitting	\$
Vacation/Rental Mortgage	\$	Home Care /Maint. Total	\$ -	Education /School Tuition	\$
Vacation/Rental Insurance	\$			Tutoring / Uniforms	\$
Vac./Rental Property Taxes	\$	Natural Gas	\$	Sports, Club Fees, Lessons	\$
Child Housing-Apt./Cont.	\$	Electric	\$	Summer, Activity Camps	\$
Housing Total	\$ -	Water / Sewer	\$	School supplies, Toys	\$
		Garbage	\$	Pets -Food,Vet, Grooming,Care	\$
		TV-Cable/Sat, StreamNetflx/Hulu	\$	Children & Pets Total	\$ -
Bank Credit Card Payments	\$	Internet	\$		
Consumer Charge Accounts	\$	Phone (Cell,Landline,LongDist)	\$	Fitness / Sports Membership	\$
Auto Loans	\$	Newspapers, Magazines	\$	Haircuts, Styling, Products	\$
Personal Loans-School, etc	\$	Security Monitoring	\$	Mani-Pedi / Grooming	\$
Debt payment Total	\$ -	Utilities Total	\$ -	Makeup / Tanning	\$
				Spa / Beauty Treatments	\$
Auto Maintenance & Fuel	\$	Health Insurance	\$	Personal Services Total	\$ -
Auto Insurance	\$	Medicare Insurance	\$		
Parking & Tolls	\$	Life Insurance	\$	Entertainmt-Movie,Concrt,Sports	\$
Public Transport / Cabs	\$	Disability Insurance, AD&D	\$	Travel-Vacatn,FamilyVisits,Saving	\$
Transportation Total	\$ -	Medical Copayments/Prescriptions	\$	Hobbies & Crafts	\$
		OTC, Vitamins/Supplements	\$	Entertainment Total	\$ -
Income Taxes (Federal & St)	\$	Dental /Orthodontic /Periodontic	\$		
SocSec,Medicare,WC Taxes	\$	Glasses, Contacts	\$	Clothing, DryCleaning, Laundry	\$
Tax Prep Service	\$	Chiropractic/PhysTh/Massage	\$	Household Goods	\$
Banking/Financial Fees	\$	Counseling/Psych/Coaching	\$	Office&School Supplies, Postage	\$
Legal Services	\$	Health Total	\$ -	Electronics /Comp,Periph,SW	\$
Liability Insurance	\$			DurableGd,SmAppliances,Tools	\$
Taxes and Legal Total	\$ -	Business-Liability Insur./Bonding	\$	Furniture, Lighting, Rugs	\$
		-Licensing /Continuing Educatn	\$	Sports & Rec Equipment	\$
Pre-Tax Retirement contrib.	\$	-ProfAssnDues/Union/Uniforms	\$	Books,Music,Video-Movies	\$
After-tax Retirement contrib.	\$	-Unreimb.Travel/Entertainmt	\$	Total Purchases	\$ -
College Funds	\$	-Books/Subscriptions/SW	\$		
Systematic Savings	\$	-SmallPurchases,MinorExpenses	\$	Charitable Contributions	\$
Savings Total	\$ -	Business-Capital Equip /Buy-in	\$	Gifts-birthdays,holidays,etc	\$
		Business & Work-Related	\$ -	Miscellaneous expenses	\$
				Total Gifts	\$ -
Total Column1 Exp:	\$ -	Total Column 2 Exp:	\$ -	Total Column 3 Exp:	\$ -
Monthly Income:	\$ -	Monthly Expenses	\$ -	Budget difference:	\$ -
Annual Income:	\$ -	Annual Discretionary Funds (or shortfall):			\$ -

SCF Securities did not assist in the preparation of this material. While SCF believes the material to be from reliable source, its accuracy and completeness are not guaranteed and will not be held responsible for any errors that might occur. This should not be construed as tax advice, & you should speak with your tax advisor. All opinions offered herein are those of the author, and not those of SCF Securities. SCF Securities is not responsible for any information contained on or within website or literature referred to herein.

Securities offered through SCF Securities, Inc. - Member FINRA / SIPC; Investment Advisory Services offered through SCF Investment Advisors, Inc.

155 E Shaw Ave Suite 102, Fresno CA 93710, Ph: 800-955-2517, Fax: 559-456-6109

SCF Securities, Inc. and Amerisal Financial are not affiliated.

CLIENT PROVIDED INFORMATION FOR PROJECTION PURPOSES ONLY