

# Client Budget Worksheet



Date: \_\_\_\_\_

Client name / No: \_\_\_\_\_

Client address: \_\_\_\_\_

\_\_\_\_\_

Financial Mentor: \_\_\_\_\_

Monthly to Weekly ( x 12 ÷ 52 )

Annually to Weekly ( ÷ 52 )

INCOME (NET after tax)		Weekly / Fortnightly	Monthly Expenses	Monthly	Weekly / Fortnightly
Salary / Wages			Bank fees		
Partner's income			House mortgage		
Working for Families Assistance			Electricity		
Child Support			Gas		
Benefit (before deductions)			Phone		
Family Tax Credit			Mobile phone		
Accommodation Supplement			Internet		
Disability / Child Disability			Pay TV		
Temporary Additional Support			Appliance rental		
Student Loan / Allowance			Credit contracts		
ACC					
Superannuation / Pension					
Rent / Board					
Other income			Credit / Store cards		
	TOTAL INCOME				
TOTAL (1)					
TOTAL (2)			Personal loans		
TOTAL (3)			Other monthly costs		
TOTAL (4)					
TOTAL				TOTAL (2)	
TOTAL INCOME			Annual Expenses	Annual	Weekly / Fortnightly
Less - TOTAL EXPENSES			House insurance		
Equals = SURPLUS (DEFICIT)			Contents insurance		
			Health / Life insurance		
			Vehicle insurance		
			Vehicle registration		
			Warrant of Fitness		
			Vehicle maintenance		
EXPENSES		Weekly / Fortnightly	Road User Charges (diesel)		
Benefit repayments			School fees		
IRD payments			School activity fees		
Court payments			Other school costs		
Child Support			Rates		
Groceries - general			Regional Rates		
Groceries - other			Water Rates		
Rent / Board			Recreation / Membership (adults)		
Petrol / Fuel			Recreation / Membership (children)		
Fares			Other annual costs		
Personal cash					
Liquor					
Tobacco					
Gambling					
Childcare / Daycare			Other Expenses	Annual	Weekly / Fortnightly
Preschool (kōhanga reo), playcentre etc.			Heating (wood, coal etc.)		
School (trips, lunch money etc.)			Taxation provision		
Giving (charity, koha etc.)			Medical		
Children's pocket money			Dental		
Superannuation			Optician		
Savings			Presents		
Other weekly / fortnightly expenses			Repairs		
			Clothing / Shoes		
			Haircuts		
			Christmas club		
			Vet fees		
			Other costs		
	TOTAL (1)			TOTAL (4)	

Signed Financial Mentor \_\_\_\_\_

Signed Client \_\_\_\_\_

Name of budgeting service \_\_\_\_\_

This budget has been prepared for the client above from informations supplied by them. The information has not been verified and no responsibility is accepted for its accuracy. The budget has been prepared on request by the above and is prepared for their purposes only. Neither the Financial Mentor or the budgeting service accept any responsibility to any other persons or organisations, on any grounds whatsoever, for the accuracy or otherwise of this information.