

Annual Budgeting Worksheet



Salt River Financial Services

Year _____ Monthly Amount Needed to Set Aside \$ _____

Use this worksheet to budget for annual expenses, such as taxes, insurance, home and auto repairs, warranties, school tuition, etc. Adjust household budget as needed and keep annual budgeted funds in an interest-bearing savings account if possible.

	Expenses	Annual Cost	Divide by 12 (or 6)	Total to be saved each month
1	<i>Example Expense</i>	<i>\$300/year</i>	<i>\$300/ 12 months = \$25 per month</i>	<i>\$25</i>
2	Home or Renters Insurance			
3	Auto Insurance			
4	Ceremony Expenses			
5	Holidays & Gifts			
6	Vacation, Travel			
7	Taxes			
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