



## Budget Planner

Name: \_\_\_\_\_

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

Financial Planner's Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Please complete the budget planner and return it to your financial planner.

[www.gfmwealth.com.au](http://www.gfmwealth.com.au)

190 Through Road, Camberwell VIC 3124 T: (03) 9809 1221 F: (03) 9809 2055 [enquiry@gfmwealth.com.au](mailto:enquiry@gfmwealth.com.au)

Income	Amount	Frequency	Total Per Annum
After tax salary, bonuses & overtime - Self	\$		\$
After tax salary, bonuses & overtime - Partner	\$		\$
Investment Income (interest, dividends)	\$		\$
Govt. pensions & allowances	\$		\$
Rent, board income	\$		\$
Other Income (child support, gifts etc)	\$		\$
<b>Total Income</b>	<b>\$</b>		<b>\$</b>
<b>General Expenses</b>			
Mortgages / loans / rent			
Mortgage(s)	\$		\$
Rent & body corporate fees	\$		\$
Personal, car, share loan repayments	\$		\$
Credit card repayments	\$		\$
Lease repayments, equipment rental	\$		\$
Other expenses	\$		\$
Home expenses			
Home maintenance	\$		\$
Home renovations	\$		\$
Rates & levies (council, water etc)	\$		\$
Home services (cleaning etc)	\$		\$
Telephone, mobile & internet (rental, purchase, calls etc)	\$		\$
Utilities (gas, electric etc)	\$		\$
Other	\$		\$
Living expenses			
Groceries, lunches etc	\$		\$
Clothing	\$		\$
Household purchases (appliances, furniture etc)	\$		\$
Childcare & child minding	\$		\$
Pet care (pet food, vet, registration etc)	\$		\$
Donations & gifts	\$		\$
Other	\$		\$
Personal care expenses			
Medical bills (doctor, dentist, optometrist etc)	\$		\$
Pharmacy, prescriptions	\$		\$
Hair care & products	\$		\$
Beauty products & treatments	\$		\$
Other	\$		\$
Education expenses			
School/Uni fees, personal courses etc	\$		\$
School uniform & books etc	\$		\$
School excursions & tutoring etc	\$		\$
Other	\$		\$
<b>Total general expenses</b>	<b>\$</b>		<b>\$</b>

Car / Transport			
Car / motor bike registration	\$		\$
Licence & fines, motor vehicle association	\$		\$
Car / motor bike service, maintenance & repairs	\$		\$
Petrol	\$		\$
Fares (public transport & taxis)	\$		\$
Parking fees	\$		\$
Boat registration & maintenance etc	\$		\$
Caravan registration & maintenance etc	\$		\$
Trailer registration & maintenance etc	\$		\$
Other (car wash etc)	\$		\$
<b>Total car / transport expenses</b>	<b>\$</b>		<b>\$</b>
Insurance & Superannuation			
Life, disablement, income protection, trauma	\$		\$
Private health cover	\$		\$
Home & contents	\$		\$
Car & motorbike	\$		\$
After tax superannuation contributions	\$		\$
Other	\$		\$
<b>Total insurance &amp; superannuation</b>	<b>\$</b>		<b>\$</b>
Leisure / Entertainment			
Holidays, weekends away	\$		\$
Restaurants & take away	\$		\$
General entertainment	\$		\$
Sports, hobbies, club memberships etc	\$		\$
Newspapers, magazines, books, CDs, DVDs (incl. rental)	\$		\$
Pay TV	\$		\$
Birthdays, anniversaries, christmas etc	\$		\$
Other	\$		\$
<b>Total leisure / entertainment</b>	<b>\$</b>		<b>\$</b>
Fees & Charges			
Bank fees	\$		\$
Accounting & financial planning fees	\$		\$
Other	\$		\$
<b>Total Expenses</b>	<b>\$</b>		<b>\$</b>
<b>Surplus / Deficit</b>	<b>\$</b>		<b>\$</b>
Summary			
Total Income	\$		\$
Total Expenses	\$		\$
<b>Amount you can save</b>	<b>\$</b>		<b>\$</b>