Budget Organizer
Financial Snapshot

Provided to:

Provided by:

The Financial Snapshot Series serves to help identify your financial needs and may be used in developing proposed solutions consistent with your needs and objectives. Other "needs analysis" programs may provide different results, depending on methodology, assumptions and/or input. While the included worksheet(s) can give you a general idea of your needs, you should consult with a licensed financial representative for complete details about specific products that may be used to meet your financial needs. See additional Important Information on the final page of this report.

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Budget Organizer Snapshot for:

Income

Income:	Monthly Amount	Annual Amount
Salary and Bonuses	$	$ 0
Interest/Investment Income		0
Other Income		0
Income Sub-Total:	0	0
Income Taxes:		
Federal Income Taxes		0
State Income Taxes		0
FICA/Self-Employment Taxes		0
Income Taxes Sub-Total:	0	0
☐ **Calculate Available Income:**	$ 0	$ 0

Fixed Expenses: Personal

Housing:	Monthly Amount	Annual Amount
Mortgage/Rent Payment	$	$ 0
Property Taxes		0
Homeowners/Renters Insurance		0
Transportation:		
Car Payment		0
Automobile Insurance		0
Parking/Tolls/Bus/Train		0
Loans:		
Credit Card Payments		0
Personal Loan/Student Loan Payments		0
Insurance:		
Life Insurance Premiums		0
Disability Income Insurance Premiums		0
Health Insurance Premiums		0
Dental/Vision Insurance Premiums		0
Personal / Family:		
Child Support/Child Care Expenses/Alimony		0
Membership/Professional Dues		0
Savings / Investments:		
Emergency Fund		0
Personal Savings/Investments		0
Retirement Savings (401(k) or IRA)		0
Other Fixed Expenses:		0
☐ **Calculate Total Fixed Expenses:**	$ 0	$ 0

Budget Organizer Snapshot for:

Variable Expenses: Personal

	Monthly Amount	Annual Amount
Housing:		
Utilities (electricity, gas, water)	$	$ 0
Telephone/Internet		0
Home Repair/Maintenance		0
Household Goods/Furnishings		0
Transportation:		
Fuel		0
Auto Repair/Maintenance		0
Parking/Tolls/Bus/Train		0
Personal/Family:		
Food/Personal Care Items		0
Clothing		0
Laundry/Dry Cleaning		0
Doctor/Dental/Prescription Drug Expenses		0
Gifts/Charitable Contributions		0
Entertainment:		
Cable/Satellite TV		0
Dining Out		0
Movies/Sporting Events		0
Babysitter		0
Hobbies		0
Vacation/Travel		0
Other Variable Expenses:		
		0
		0
		0
Calculate Total Variable Expenses:	**$** 0	**$** 0

Total Personal Expenses

	Monthly Amount	Annual Amount
Total Fixed Expenses	$ 0	$ 0
Total Variable Expenses	0	0
Calculate Total Personal Expenses:	**$ 0**	**$ 0**

Budget Organizer Snapshot for:

Fixed and Variable Expenses: Business

	Monthly Amount	Annual Amount
Rent/Mortgage Payment	$	$ 0
Salaries		0
Taxes		0
Employee Benefits		0
Telephone/Internet		0
Insurance		0
Transportation/Fuel Expenses		0
Travel		0
Tax/Accounting/Banking Services		0
Advertising/Promotions		0
Printing/Stationary/Postage		0
Business Entertainment		0
Professional/Association Dues		0
Other Business Expenses:		
		0
		0
		0
Calculate Total Business Expenses:	$ 0	$ 0

Balance Sheet

	Monthly Amount	Annual Amount
Available Income	$ 0	$ 0
Total Personal Expenses	- 0	- 0
Total Business Expenses	- 0	- 0
Calculate Surplus/Shortage:	$ **0**	$ **0**

Important Information

The worksheet(s) in this report serve to help identify your financial needs and priorities and may be used in developing proposed solutions consistent with your needs and objectives. While the worksheet(s) can give you a general idea of certain financial needs, you should consult with your licensed financial representative on how specific products may work for you in your particular situation. Your licensed financial representative will also provide you with costs and complete details about any products recommended to meet your specific needs and financial objectives.

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