



STATE FARM FEDERAL  
CREDIT  
UNION®

2010  
BUDGET WORKBOOK

**This Year's Goals:**

**Ways to achieve this goal:**

Pay off (credit cards or loans).

.....  
.....  
.....

Save for (item) to be purchased  
this year.

.....  
.....

Save for (event/vacation) planned  
this year.

.....  
.....

Add to (dollar amount) savings.

.....  
.....

Save for the holidays.

.....  
.....

.....  
.....



# Budget Worksheet · January 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

Homeowners/Renters Insurance

Property Taxes

Home Repairs & Maintenance

Cable/Satellite TV

Internet

Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

Prescriptions

Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

Personal Cash

Other

## **Entertainment/Recreation**

Hobbies

Subscriptions & Dues

Vacations

Other

## **Pets**

Food

Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · February 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

Homeowners/Renters Insurance

Property Taxes

Home Repairs & Maintenance

Cable/Satellite TV

Internet

Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

Prescriptions

Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

Personal Cash

Other

## **Entertainment/Recreation**

Hobbies

Subscriptions & Dues

Vacations

Other

## **Pets**

Food

Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · March 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

Homeowners/Renters Insurance

Property Taxes

Home Repairs & Maintenance

Cable/Satellite TV

Internet

Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

Prescriptions

Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

Personal Cash

Other

## **Entertainment/Recreation**

Hobbies

Subscriptions & Dues

Vacations

Other

## **Pets**

Food

Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · April 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

Homeowners/Renters Insurance

Property Taxes

Home Repairs & Maintenance

Cable/Satellite TV

Internet

Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

### **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

Prescriptions

Fitness (Health Club Fees, etc.)

### **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

### **Food**

Groceries

Eating Out

### **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

Personal Cash

Other

### **Entertainment/Recreation**

Hobbies

Subscriptions & Dues

Vacations

Other

### **Pets**

Food

Grooming/Vet

### **Clothing**

Purchases

Dry cleaning/Laundry

### **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

### **Charitable Contributions**

### **Miscellaneous Expenses**

# May

## Notes

| Sun          | Mon                             | Tues | Wed | Thur | Fri | Sat |
|--------------|---------------------------------|------|-----|------|-----|-----|
|              |                                 |      |     |      |     | 1   |
| 2            | 3                               | 4    | 5   | 6    | 7   | 8   |
| 9            | 10                              | 11   | 12  | 13   | 14  | 15  |
| Mother's Day |                                 |      |     |      |     |     |
| 16           | 17                              | 18   | 19  | 20   | 21  | 22  |
| 23           | 24                              | 25   | 26  | 27   | 28  | 29  |
| 30           | 31<br>Memorial Day,<br>Observed |      |     |      |     |     |

Notes section with horizontal dotted lines for writing.

# Budget Worksheet · May 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

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Home Repairs & Maintenance

Cable/Satellite TV

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Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

Prescriptions

Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

Personal Cash

Other

## **Entertainment/Recreation**

Hobbies

Subscriptions & Dues

Vacations

Other

## **Pets**

Food

Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · June 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

Homeowners/Renters Insurance

Property Taxes

Home Repairs & Maintenance

Cable/Satellite TV

Internet

Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

Prescriptions

Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

Personal Cash

Other

## **Entertainment/Recreation**

Hobbies

Subscriptions & Dues

Vacations

Other

## **Pets**

Food

Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · July 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

Homeowners/Renters Insurance

Property Taxes

Home Repairs & Maintenance

Cable/Satellite TV

Internet

Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

Prescriptions

Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

Personal Cash

Other

## **Entertainment/Recreation**

Hobbies

Subscriptions & Dues

Vacations

Other

## **Pets**

Food

Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · August 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

Homeowners/Renters Insurance

Property Taxes

Home Repairs & Maintenance

Cable/Satellite TV

Internet

Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

Prescriptions

Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

Personal Cash

Other

## **Entertainment/Recreation**

Hobbies

Subscriptions & Dues

Vacations

Other

## **Pets**

Food

Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · September 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

Homeowners/Renters Insurance

Property Taxes

Home Repairs & Maintenance

Cable/Satellite TV

Internet

Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

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Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

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## **Entertainment/Recreation**

Hobbies

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Vacations

Other

## **Pets**

Food

Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · October 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

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Property Taxes

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Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

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Prescriptions

Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

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Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

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Other

## **Entertainment/Recreation**

Hobbies

Subscriptions & Dues

Vacations

Other

## **Pets**

Food

Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · November 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

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Property Taxes

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Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

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Insurance – Personal Articles and/or PLUP

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## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**



# Budget Worksheet · December 2010

## **INCOME:**

Wages & Bonuses

Interest Income

Investment Income

Misc. Income

## **Income Taxes Withheld:**

Federal

State & Local

Social Security

Medicare

## **EXPENSES:**

### **Home**

Mortgage or Rent

Home Equity Loan

Homeowners/Renters Insurance

Property Taxes

Home Repairs & Maintenance

Cable/Satellite TV

Internet

Utilities

Water & Sewer

Garbage Pickup

Telephone (Home, Cell)

Other

### **Transportation**

Car Payments/Bus or Train Fare

Insurance

Gasoline/Oil

Repairs/Maintenance

Fees (License/Tolls)

Other

### **Debt Payments (not listed elsewhere)**

Student Loans

Credit Cards

Other loans

## **Health & Medical**

Insurance – Medical/Dental/Vision

Deductible & co-pays

Prescriptions

Fitness (Health Club Fees, etc.)

## **Family Obligations**

Day Care/Babysitting

School Tuition/Books

Other

## **Food**

Groceries

Eating Out

## **Personal**

Insurance – Life

Insurance – Personal Articles and/or PLUP

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Grooming/Vet

## **Clothing**

Purchases

Dry cleaning/Laundry

## **Investments & Savings**

401(k) or IRA

Mutual Funds/Stocks/Bonds

College Fund

Emergency

Miscellaneous Savings

## **Charitable Contributions**

## **Miscellaneous Expenses**