



**THE SCHOOL**  
*of*  
**GREATNESS**  
**ACADEMY**

**Financial Assessment and  
Budgeting Worksheet**

# CURRENT ASSESSMENT

## Housing

Mortgage / Rent.....  
 Property Taxes.....  
 Home Maintenance.....  
 Homeowner's Insurance.....  
 Utilities (Electric, Gas,  
 Water, Cable, etc.).....  
 Telephone.....

## Transportation

Auto Payment(s).....  
 Auto Insurance.....  
 Gas.....  
 Maintenance/License.....  
 Parking/Tolls/Bus/Train.....

**COLUMN 1 TOTAL**.....

## Household/Personal

Groceries.....  
 Personal Care.....  
 Clothing / Dry Cleaning.....  
 Domestic Help.....  
 Professional Dues.....  
 Dependent / Child Care.....  
 Education / School.....  
 Cash / Allowances.....

## Personal Insurance

Health Insurance.....  
 Life Insurance.....  
 Disability Insurance.....  
 Long Term Care.....  
 Medical/Dental/Drugs.....

**COLUMN 2 TOTAL**.....

## Loan Payments/Savings

Credit Card Payments.....  
 Other Loan Payments.....  
 Savings / Investing.....

## Discretionary

Dining Out.....  
 Recreation / Club Dues.....  
 Movies / Sporting Events.....  
 Hobbies.....  
 Vacation / Travel.....  
 Child Care.....  
 Gifts / Contributions.....  
 Taxes (if necessary).....  
 Other ( ).....  
 Other ( ).....

**COLUMN 3 TOTAL**.....

**TOTAL EXPENSES (1+2+3)**.....

**NET MONTHLY INCOME**.....

**LESS EXPENSES**.....

**TOTAL SURPLUS/DEFICIT**.....

# PROJECTED ASSESSMENT

## Housing

Mortgage / Rent.....  
 Property Taxes.....  
 Home Maintenance.....  
 Homeowner's Insurance.....  
 Utilities (Electric, Gas,  
 Water, Cable, etc.).....  
 Telephone.....

## Transportation

Auto Payment(s).....  
 Auto Insurance.....  
 Gas.....  
 Maintenance/License.....  
 Parking/Tolls/Bus/Train.....

**COLUMN 1 TOTAL**.....

## Household/Personal

Groceries.....  
 Personal Care.....  
 Clothing / Dry Cleaning.....  
 Domestic Help.....  
 Professional Dues.....  
 Dependent / Child Care.....  
 Education / School.....  
 Cash / Allowances.....

## Personal Insurance

Health Insurance.....  
 Life Insurance.....  
 Disability Insurance.....  
 Long Term Care.....  
 Medical/Dental/Drugs.....

**COLUMN 2 TOTAL**.....

## Loan Payments/Savings

Credit Card Payments.....  
 Other Loan Payments.....  
 Savings / Investing.....

## Discretionary

Dining Out.....  
 Recreation / Club Dues.....  
 Movies / Sporting Events.....  
 Hobbies.....  
 Vacation / Travel.....  
 Child Care.....  
 Gifts / Contributions.....  
 Taxes (if necessary).....  
 Other ( ).....  
 Other ( ).....

**COLUMN 3 TOTAL**.....

**TOTAL EXPENSES (1+2+3)**.....

**NET MONTHLY INCOME**.....

**LESS EXPENSES**.....

**TOTAL SURPLUS/DEFICIT**.....