



Income and Expense Statement Template

	Total Points Earned
	Total Points Possible
	Percentage

Name _____

Date _____

Class _____

Income and Expense Statement for:		
Time Period:		
		Amount
Income		
Earned Income		
Wages or salary before deductions		
Commissions/tips/bonuses		
Tax refunds		
Unearned Income		
Interest earned this time period		
Investment earnings earned this time period		
Sales of assets		
Money from savings and investments to help pay expenses during this time period		
Scholarships/grants from non-government sources		
Money from others		
Child support		
Other		
Received Income from Government Programs		
Scholarships/grants from government sources		
Government programs		
Total Income		\$
Expenses		
Deductions Often Taken from Paychecks		
Contribution to a retirement program (401k, 403b, pension)		
Individual retirement account contribution (IRA)		
Federal Income Tax		
State Income Tax		
Social Security		
Medicare		
Saving and Investing (Pay Yourself First)		
Contribution to savings and investments		
Insurance Premiums		
Health insurance, Medicaid and Medicare		
Renters or homeowners insurance		
Automobile insurance		
Disability insurance		
Life insurance		
Housing Costs		
Property taxes (if house or condo is owned)		
Housing payment (rent or mortgage)		
Utilities (gas, electricity, water, garbage)		



Household furnishings	
Household maintenance and repairs	
Transportation Costs	
Automobile payment	
Fuel (gasoline/diesel)	
Automobile repairs and maintenance	
Public transportation fees	
Automobile license and registration (yearly fee)	
Food Costs	
Food at the grocery store	
Meals at restaurants	
Snacks away from home (coffees, treats)	
Non-food kitchen supplies (plastic wrap, dish soap)	
Family Member Care	
Child care or other dependent care	
Personal allowances	
Communication and Computers	
Telephone land line	
Cell phone	
Internet	
Cable/satellite television	
Computer related expenses	
Medical Costs Not Covered by Insurance	
Medical care	
Dental care	
Eye care (check-ups, glasses, contact lenses)	
Medications – prescription, over-the-counter	
Clothing and Personal Care	
Clothing	
Personal care (shampoo, haircuts, cosmetics, laundry, etc.)	
Educational Expenses	
Tuition for private school or higher education	
Private lessons	
Sports and organization fees	
Educational supplies (books, news)	
Pet Care	
Pet food	
Pet supplies (toys, medicine)	
Veterinary services	
Pet care (pet walking, overnight stays, grooming)	
Entertainment	
Movies, books, and other entertainment	
Vacations	
Other	
Gifts and Charitable Contributions	
Gifts to others and charitable contributions to organizations	
Credit Costs	
Student loan payment	
Credit card payment	
Other:	
Total Expenses	\$
Net Gain or Net Loss (Income less Expenses)	\$