



Certified Financial Health Counselors

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Monthly Spending Plan

When filling out this form, we would like for you to be as detailed as possible. Do not leave anything out as it will make it harder to help you in a variety of ways.

Many times the expenses we incur only happen once or twice a year. PLEASE INCLUDE THESE in each category. If possible, consult with a spouse or partner. For each category, add up every expense you will have in a year for that category. Then divide that amount by 12 (months).

All information is confidential. Again, please leave nothing out. Be honest with yourself and your significant other. Be warned: Often this form causes heated discussions between couples! For many people this is their first time that they are being accountable to themselves and their spouses. Once the dust settles, **call us to schedule your free consultation.**

Weekly Budget Planner

This form is simple to use and can really help you put your money where it belongs. The goal of this planner is to spend the money on paper before you actually spend the money.

Take the information from your Monthly Spending Plan to use. Divide up the expenses according to the dates that they are due. Pay those bills on paper according to your weekly / bi-weekly / monthly pay periods. This will allow you to prioritize your spending. Make sure to have your significant other work with you on completing this form also.

Once this is done, we can show you several budgeting techniques that may allow you to track your expenses, plan for upcoming events, and establish an emergency plan so you do not have to rely on credit cards.