

Monthly Expense Summary

INSTRUCTIONS: As you are selecting an industry to work in, it is important to make sure that it provides you with the opportunity to support you and your family's needs. To do this, we ask you complete this Monthly Expense Summary and calculate your monthly and hourly wages and your annual earnings. This exercise is meant to be a tool to help you estimate and research the financial opportunity that you need an industry to provide. You do not need to have exact numbers; estimates will work.



CUSTOMER: _____ **DATE:** _____

Number of Adults in Home: _____

Number of Children in Home: _____

Monthly Expense	Amount
Housing — Rent/Mortgage, Utilities (Water, Gas, Electric and Trash)	
Childcare	
Food	
Health	
Transportation	
Miscellaneous — Medication, Cell Phone, Internet, etc.	
Monthly Basic Needs Wage (Housing + Childcare + Food + Health + Transportation + Miscellaneous)	
Hourly Basic Needs Wage (Monthly Basic Needs Wage / 160 Hours)	
Annual Basic Needs Earnings (Monthly Basic Needs Wage * 12)	

1 What are some other expenses that are not listed in the monthly expense summary (examples: personal loans, credit cards etc.)?

2 Does the industry and job you are researching provide you with the opportunity to meet or exceed your monthly expense summary?

yes no

If no, will that opportunity be available to you as you grow in the industry's career pathway?

yes no

3 If you are planning to attend training, is there anything about your budget that will change that would prevent you from being able to complete the training (transportation to training, expanded childcare, etc.)?

yes no

Please explain:
