
Senior Monthly Budget Worksheet

A simple printable worksheet to track income, fixed bills, flexible spending, health costs, and savings at a glance.

Month / Year: _____ Budget Owner: _____ Notes: _____

1) Monthly Income

Income Source	Expected	Actual	Notes
Pension / CPP / OAS			
Part-time work			
Investment / interest			
Other income			
Total Monthly Income			

2) Monthly Expenses

Expense Category	Budgeted	Actual	Due / Notes
Housing / Rent / Mortgage			
Utilities			
Groceries			
Transportation			
Medications / Health			
Insurance			
Phone / Internet			
Household / Personal Care			
Gifts / Family / Social			
Savings / Emergency Fund			
Other			
Total Monthly Expenses			

3) Monthly Check-In

Left Over / Shortfall This Month:	
Biggest Expense Category:	
One Spending Area to Watch Next Month:	

Tip: Keep this worksheet somewhere visible and review it once a week. A simple system is easier to stick with than a complicated one.