

# Worksheet 2: Making a Quarterly Budget

Visit [www.finaid.ucsb.edu/Features.aspx](http://www.finaid.ucsb.edu/Features.aspx) to use this in online calculator format.

You might also look for smartphone apps that offer simple budgeting and money management tools – these can be useful if you’re committed to tracking your expenses in real time or on the go. If you are attending summer school, you should create a budget for that as well.

## Fall Quarter

Begin by filling in the “Income” fields, then “Expenses,” then add the totals to get your “Balance.”

### INCOME

Work Income	\$
Grants	\$
Loans	\$
Parents	\$
Other	\$
<b>TOTAL</b>	\$

### EXPENSES

Tuition/Fees	\$
Health Care	\$
Books/Supplies	\$
Food	\$
Rent*	\$
Utilities	\$
Cell phone	\$
Transportation	\$
Personal Expenses	\$
<b>TOTAL</b>	\$

**INCOME TOTAL:** \$ \_\_\_\_\_

**EXPENSES TOTAL:** \$ \_\_\_\_\_

**BALANCE:** \$ \_\_\_\_\_

## Winter Quarter

**BALANCE AVAILABLE TO ROLL OVER:** \$ \_\_\_\_\_

### INCOME

Work Income	\$
Grants	\$
Loans	\$
Parents	\$
Other	\$
<b>TOTAL</b>	\$

### EXPENSES

Tuition/Fees	\$
Health Care	\$
Books/Supplies	\$
Food	\$
Rent*	\$
Utilities	\$
Cell phone	\$
Transportation	\$
Personal Expenses	\$
<b>TOTAL</b>	\$

**INCOME TOTAL:** \$ \_\_\_\_\_

**EXPENSES TOTAL:** \$ \_\_\_\_\_

**BALANCE:** \$ \_\_\_\_\_

## Spring Quarter

**BALANCE AVAILABLE TO ROLL OVER:** \$ \_\_\_\_\_

### INCOME

Work Income	\$
Grants	\$
Loans	\$
Parents	\$
Other	\$
<b>TOTAL</b>	\$

### EXPENSES

Tuition/Fees	\$
Health Care	\$
Books/Supplies	\$
Food	\$
Rent*	\$
Housing Deposit**	\$
Utilities	\$
Cell phone	\$
Transportation	\$
Personal Expenses	\$
<b>TOTAL</b>	\$

**INCOME TOTAL:** \$ \_\_\_\_\_

**EXPENSES TOTAL:** \$ \_\_\_\_\_

**BALANCE:** \$ \_\_\_\_\_

\* If you are living off-campus for Fall Quarter, “Rent” includes September, October, and November rent. For Winter Quarter, off-campus “Rent” includes December, January, and February. For Spring Quarter, off-campus “Rent” includes March, April, and May.

\*\* “Housing Deposit” refers to the deposit you will pay for next year’s apartment.