

Monthly Budget Reset Checklist

A monthly review for changes in income, bills and essentials.

Use this at the start or end of each month to update the figures that affect the household budget.

Purpose

- Keep the budget current.
- Review changed bills.
- Check whether food, travel or family costs have moved.
- Prepare for the next pay cycle.

Review

- Income changes.
- Energy, phone, broadband or insurance changes.
- Food and travel increases.
- Annual or irregular payments.
- New subscriptions or cancelled payments.

Good to remember

A budget that is not updated can become misleading quickly when costs change.

Checklist

Done	Step	Notes
☐	Check income	
☐	Check bills	
☐	Check essentials	
☐	Check subscriptions	
☐	Update spreadsheet if needed	

Worksheet

Complete this page before starting a full budget review or spreadsheet setup.

Month reviewed	
Income changed?	
Bills changed?	
Food/travel changed?	
Family/household costs changed?	
Any new annual or irregular costs?	
Budget needs updated?	Yes / No
Notes	

Paid client budgets are prepared on spreadsheet using the figures supplied and calculated to the penny.