Worksheet 2: Making a Quarterly Budget

Visit 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.

<table>
<thead>
<tr>
<th>Fall Quarter</th>
<th>Winter Quarter</th>
<th>Spring Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Begin by filling in the “Income” fields, then “Expenses,” then add the totals to get your “Balance.”</strong></td>
<td><strong>BALANCE AVAILABLE TO ROLL OVER:</strong> $</td>
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</tr>
</tbody>
</table>

### INCOME

- **Work Income** $
- **Grants** $
- **Loans** $
- **Parents** $
- **Other** $
- **TOTAL** $

### EXPENSES

- **Tuition/Fees** $
- **Health Care** $
- **Books/Supplies** $
- **Food** $
- **Rent** $
- **Utilities** $
- **Cell phone** $
- **Transportation** $
- **Personal Expenses** $
- **TOTAL** $

**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.

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