

Lump Sum Payment Form

Hey, let's face it. We all take our lumps sometimes. It's life! But we can still be ready!

Plan for the big once- or twice-a-year payments.

This is the form for the payments you make on a non-monthly basis, like insurance premiums and taxes. They can be budget busters if you don't plan for them every month.

When this item comes due, how much will you need to cover it?

Use the formula below to find how much to budget

This amount goes into your monthly budget form

| ITEM NEEDED | AMOUNT NEEDED | ÷ | MONTHS | = | BUDGETED |
|-----------------------------|---------------|---|--------|---|----------|
| Real Estate Taxes | _____ | | _____ | | _____ |
| Homeowner's Insurance | _____ | | _____ | | _____ |
| Home Repairs | _____ | | _____ | | _____ |
| Replace Furniture | _____ | | _____ | | _____ |
| Medical Bills | _____ | | _____ | | _____ |
| Health Insurance | _____ | | _____ | | _____ |
| Life Insurance | _____ | | _____ | | _____ |
| Disability Insurance | _____ | | _____ | | _____ |
| Car Insurance | _____ | | _____ | | _____ |
| Car Repair/Tags | _____ | | _____ | | _____ |
| Replace Car | _____ | | _____ | | _____ |
| Clothing | _____ | | _____ | | _____ |
| Tuition | _____ | | _____ | | _____ |
| Bank Note | _____ | | _____ | | _____ |
| IRS (Self-Employed) | _____ | | _____ | | _____ |
| Vacation | _____ | | _____ | | _____ |
| Gifts (Including Christmas) | _____ | | _____ | | _____ |
| Other _____ | _____ | | _____ | | _____ |
| Other _____ | _____ | | _____ | | _____ |
| Other _____ | _____ | | _____ | | _____ |