

Individual Income Summary



Financial Wellness



1. Income from employers

Paycheck #1				
Employer:				
Frequency:	Weekly	Biweekly	Monthly	Other:
Date of Payday(s):				
Method:	Direct Deposit	Paper Check	Paycard	Other:
Gross Pay Per Month:	\$			
	Individually list	all deductions lik	e health insur	ance, retirement
		axes and wage g	arnishments.	
	Deduct	ion Type		Amount
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
	Total Ded	uctions, Taxes &	\$	
		Garnishments:		
Net Pay Per Month:				
Paycheck #2				
Employer:				
Frequency:	Weekly	Biweekly	Monthly	Other:
Date of Payday(s):				
Method:	Direct Deposit	Paper Check	Paycard	Other:
Gross Pay Per Month:	\$			
	,	all deductions lik		ance, retirement
		axes and wage g		
	Deduct	ion Type		Amount
			\$	
			\$	
			\$	
			\$	
		,	\$	
			\$	
			\$	
	Total Ded	uctions, Taxes &	\$	
		Garnishments:		
Net Pay Per Month:				Page 1

Paycheck #3				
Employer:				
Frequency:	Weekly	Biweekly	Monthly	Other:
Date of Payday(s):				
Method:	Direct Deposit	Paper Check	Paycard	Other:
Gross Pay Per Month:	\$			
		all deductions lik axes and wage g		rance, retirement
	Deduct	ion Type		Amount
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
	Total Ded	uctions, Taxes & Garnishments:	\$	
Net Pay Per Month:				
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Paycheck #4				
Employer:				
Frequency:	Weekly	Biweekly	Monthly	Other:
Date of Payday(s):				
Method:	Direct Deposit	Paper Check	Paycard	Other:
Gross Pay Per Month:	\$			
	Individually list all deductions like health insurance, retirement contributions, taxes and wage garnishments.			
	Deduct	ion Type		Amount
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
	Total Ded	uctions, Taxes & Garnishments:	\$	
Net Pay Per Month:				

3. Income from self-employment

If you are self-employed, use this space to describe the dollar values of the income, taxes and expenses you routinely encounter, as well as the timing of those cash flows (e.g., you may pay taxes quarterly but bill clients monthly on a net-60 cycle).

4. Income from other sources

If you are receiving child support, alimony, Social Security, or any other routine source of income, describe it here.

5. Review W-4 forms

From each employer, obtain a copy of the W-4 Form that you currently have on file. You'll reference this/these later.

6. Summary

Add up your household's monthly gross and net pay amounts. (If you are self-employed this may be an estimate.)

Monthly Gross Pay Amount	\$
Monthly Net Pay Amount	\$

To calculate your household's annual income, multiply the monthly gross pay by 12 and record that number here for later reference. (It will help you estimate your household's income tax bracket.)

Household Gross Income	\$
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