





EXPENSE WORKSHEET


TOTAL ANNUAL LIVING EXPENSES \$ -


HOME	Select Frequency	Value	Annual
	Mortgage/Rent	Monthly	\$ -
	Home Maintenance	Monthly	\$ -
	Home Supplies	Monthly	\$ -
	Household Services	Monthly	\$ -
	Furniture/Décor	Monthly	\$ -
	Property Tax	Monthly	\$ -
	Other:	Monthly	\$ -
TOTAL: HOME			\$ -


BILLS & UTILITIES	Select Frequency	Value	Annual
	Gas & Electric	Monthly	\$ -
	Garbage & Recycling	Monthly	\$ -
	Internet, Cable & Phone	Monthly	\$ -
	Mobile Phones	Monthly	\$ -
	Sewer	Monthly	\$ -
	Water	Monthly	\$ -
	Other:	Monthly	\$ -
TOTAL: BILLS & UTILITIES			\$ -


AUTO & TRANSPORT	Select Frequency	Value	Annual
	Auto Registration	Annual	\$ -
	Auto Service	Annual	\$ -
	Gas & Fuel	Monthly	\$ -
	Public Transport	Monthly	\$ -
	Auto Payment	Monthly	\$ -
	Other:	Monthly	\$ -
	TOTAL: AUTO & TRANSPORT		


INSURANCE	Select Frequency	Value	Annual
	Auto Insurance	Monthly	\$ -
	Disability Insurance	Annual	\$ -
	Health Insurance	Monthly	\$ -
	Homeowners Insurance	Annual	\$ -
	Life Insurance	Annual	\$ -
	LTC Insurance	Annual	\$ -
	Umbrella Insurance	Annual	\$ -
TOTAL: INSURANCE			\$ -


KIDS	Select Frequency	Value	Annual
	Childcare	Monthly	\$ -
	Kids' Clothing	Annual	\$ -
	Toys	Monthly	\$ -
	Other:	Monthly	\$ -
TOTAL: KIDS			\$ -


PETS	Select Frequency	Value	Annual
	Pet Food	Monthly	\$ -
	Pet Grooming	Monthly	\$ -
	Pet Supplies	Annual	\$ -
	Veterinary	Annual	\$ -
TOTAL: PETS			\$ -


FOOD & DINING	Select Frequency	Value	Annual
	Groceries	Monthly	\$ -
	Restaurants	Monthly	\$ -
	Fast Food/Coffee Shops	Monthly	\$ -
	Alcohol & Bars	Monthly	\$ -
TOTAL: FOOD & DINING			\$ -


ENTERTAINMENT	Select Frequency	Value	Annual
	Concerts & Events	Annual	\$ -
	Movies, DVDs & Music	Monthly	\$ -
TOTAL: ENTERTAINMENT			\$ -


HEALTH & FITNESS	Select Frequency	Value	Annual
	Gym/Health Club	Monthly	\$ -
	Medical-Doctor	Annual	\$ -
	Medical-Dentist	Monthly	\$ -
	Medical-Pharmacy	Monthly	\$ -
	Other:	Monthly	\$ -
TOTAL: HEALTH & FITNESS			\$ -

PERSONAL CARE	Select Frequency	Value	Annual
	Toiletries/Cosmetics	Annual	\$ -
	Hair & Nails	Monthly	\$ -
	Spa & Massage	Monthly	\$ -
TOTAL: PERSONAL CARE			\$ -

SHOPPING	Select Frequency	Value	Annual
	Books	Annual	\$ -
	Clothing	Annual	\$ -
	Electronics/Software	Monthly	\$ -
	Sports & Hobbies	Monthly	\$ -
	Misc. Merchandise	Monthly	\$ -
TOTAL: SHOPPING			\$ -

TRAVEL & VACATION	Select Frequency	Value	Annual
	Air Travel	Annual	\$ -
	Lodging	Annual	\$ -
	Travel Food/Dining	Annual	\$ -
	Travel Entertainment	Annual	\$ -
TOTAL: TRAVEL & VACATION			\$ -

GIFTS & CHARITY	Select Frequency	Value	Annual
	Gifts	Monthly	\$ -
	Charitable Giving	Annual	\$ -
TOTAL: GIFTS & CHARITY			\$ -

SERVICES & FEES	Select Frequency	Value	Annual
	CPA	Annual	\$ -
	Financial Planner	Annual	\$ -
	Attorney	Annual	\$ -
	Annual Fees & Charges	Annual	\$ -
TOTAL: SERVICES & FEES			\$ -



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