





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			\$	-


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			\$	-


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			\$	-


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


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			\$	-


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


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			\$	-


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

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

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

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

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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