

## Financial Planning Expense Worksheet as of

**Client Name:** \_\_\_\_\_

	Monthly	Annual	Annualized Expense		Monthly	Annual	Annualized Expense
<b>Personal Savings</b>			-	<b>Clothing</b>			-
5%			-	Applicant			-
10%			-	Co-Applicant			-
20%			-	Other			-
<b>Total</b>	-	-	-	<b>Total</b>	-	-	-
<b>Charitable Contributions</b>			-	<b>Furnishings</b>			-
House of Worship			-	Inside			-
Other			-	Outside			-
<b>Total</b>	-	-	-	<b>Total</b>	-	-	-
<b>Housing</b>			-	<b>Vacations and Holidays</b>			-
Mortgage / Rent			-	Travel Tickets			-
Community Dues			-	Hotels			-
Electricity/Gas			-	Food			-
Water			-	Entertainment			-
Garbage Pickup			-	Auto			-
Telephone I/M & Cell			-	Other			-
Cable/Satellite TV			-	<b>Total</b>	-	-	-
Security Systems			-	<b>Gifts</b>			-
Pool Service			-	Holidays			-
Lawn, Pest & Repair Svc.			-	Birthdays			-
Maid Service			-	Weddings			-
Maintenance			-	Other			-
Property Taxes			-	<b>Total</b>	-	-	-
Pest/Bug Service			-	<b>Personal Care and Cash</b>			-
Other			-	Dry Cleaning			-
<b>Total</b>	-	-	-	Hair/Nails/Facials			-
<b>Children Expenses</b>			-	Cosmetics			-
Support Payments			-	Shoe Repair			-
Daycare			-	Massage			-
Activities			-	Health Club			-
Other (Supplies)			-	Other			-
<b>Total</b>	-	-	-	<b>Total</b>	-	-	-
<b>Transportation</b>			-	<b>Medical/Dental/Prescriptions</b>			-
Loan/Lease			-	Vision			-
Gas			-	Co-pay			-
Maintenance			-	Deductible			-
Tags/Inspection			-	Medication/Vitamins			-
Other			-	Other			-
<b>Total</b>	-	-	-	<b>Total</b>	-	-	-
<b>Food/Beverages</b>			-	<b>Education/Self-Improvement</b>			-
Groceries			-	Private School/College			-
Household Supplies			-	Classes			-
Wine/Beer/etc.			-	Hobbies			-
Other			-	Association Fees			-
<b>Total</b>	-	-	-	Other			-
<b>Installment Debt Payments</b>			-	<b>Total</b>	-	-	-
Student Loans			-	<b>General Insurance</b>			-
Visa			-	Liability Insurance			-
Mastercard			-	Policy 1			-
Other			-	Policy 2 (Flood)			-
<b>Total</b>	-	-	-	<b>Total</b>	-	-	-
<b>Entertainment</b>			-	<b>Homeowners Insurance</b>			-
Dining Out			-	Policy 1 (Wind)			-
Sports Tickets			-	Policy 2 (Homeow.)			-
Magazines			-	<b>Total</b>	-	-	-
Golf, etc.			-	<b>Medical Insurance</b>			-
Movies/Videos			-	Policy 1			-
Clubs/Memberships			-	Policy 2			-
Other			-	<b>Total</b>	-	-	-
<b>Total</b>	-	-	-	<b>Auto Insurance</b>			-
<b>Reinvested Dividends &amp; Distribution</b>			-	Policy 1			-
<b>Total</b>	-	-	-	Policy 2			-
<b>Pets</b>			-	<b>Total</b>	-	-	-
Food			-	<b>Other</b>			-
Veterinarian			-	Policy 1 (Vision)			-
Other			-	Policy 2 (Dental)			-
<b>Total</b>	-	-	-	Policy 3			-
<b>Miscellaneous</b>			-	<b>Total</b>	-	-	-
Support/Alimony			-	<b>TOTAL EXPENSES</b>	-	-	-
Personal Computer			-				
Other			-	<b>Income</b>	Monthly	Annual	
<b>Total</b>	-	-	-	Net Salary (self)			-
<b>Self Employment Taxes</b>			-	Net Salary (spouse)			-
Taxes			-	Rental Income			-
Other			-	Investment Income			-
<b>Total</b>	-	-	-	Child Support			-
<b>Life Insurance</b>			-	Income Misc.			-
Policy 1			-	<b>Total Income</b>	-	-	-
Policy 2			-				
<b>Total</b>	-	-	-	<b>Disposable Income</b>	-	-	-
<b>Disability Insurance</b>			-				
Policy 1			-				
Policy 2			-				
<b>Total</b>	-	-	-				
<b>Long Term Care</b>			-				
Policy 1			-				
Policy 2			-				
<b>Total</b>	-	-	-				

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