




## EXPENSE WORKSHEET


<b>TOTAL ANNUAL LIVING EXPENSES</b>	\$	-
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<b>TOTAL ANNUAL INCOME (GROSS)</b>	\$	-
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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	\$ -
	<b>TOTAL: HOME</b>		


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


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	\$ -
	<b>TOTAL: BILLS &amp; UTILITIES</b>		


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


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


AUTO & TRANSPORT	Select Frequency	Value	Annual
	Auto Registration	Annual	\$ -
	Auto Service	Annual	\$ -
	Gas & Fuel	Monthly	\$ -
	Public Transport	Monthly	\$ -
	Auto Payment	Monthly	\$ -
	Other:	Monthly	\$ -
<b>TOTAL: AUTO &amp; TRANSPORT</b>			\$ -

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


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	\$ -
<b>TOTAL: INSURANCE</b>			\$ -


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

TRAVEL & VACATION	Select Frequency	Value	Annual
	Air Travel	Annual	\$ -
	Lodging	Annual	\$ -
	Travel Food/Dining	Annual	\$ -
	Travel Entertainment	Annual	\$ -
<b>TOTAL: TRAVEL &amp; VACATION</b>			\$ -

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

GIFTS & CHARITY	Select Frequency	Value	Annual
	Gifts	Monthly	\$ -
	Charitable Giving	Annual	\$ -
<b>TOTAL: GIFTS &amp; CHARITY</b>			\$ -

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

SERVICES & FEES	Select Frequency	Value	Annual
	CPA	Annual	\$ -
	Financial Planner	Annual	\$ -
	Attorney	Annual	\$ -
	Annual Fees & Charges	Annual	\$ -
<b>TOTAL: SERVICES &amp; FEES</b>			\$ -