

## INCOME/EXPENSE DATA SHEET

Client \_\_\_\_\_

Advisor \_\_\_\_\_

Spouse \_\_\_\_\_

Date \_\_\_\_\_

	<i>Monthly</i>	<i>Annual</i>		<i>Monthly</i>	<i>Annual</i>
<b>INCOME SOURCES:</b>			<b>HOUSING EXPENSES:</b>		
Salary (C)	_____	_____	Mortgage/Rent	_____	_____
Salary (S)	_____	_____	Homeowners Insurance	_____	_____
Bonus	_____	_____	Property Taxes	_____	_____
Self Employment (C)	_____	_____	Maintenance/Repairs	_____	_____
Self Employment (S)	_____	_____	Cleaning/Yard	_____	_____
Social Security (C)	_____	_____	Utilities		
Social Security (S)	_____	_____	Electric/Gas/Oil	_____	_____
Pensions	_____	_____	Cable TV	_____	_____
Rental Income	_____	_____	Telephone	_____	_____
Investment Income	_____	_____	Water/Sewer	_____	_____
Other Income _____	_____	_____	Other Housing _____	_____	_____
Other Income _____	_____	_____	Other Housing _____	_____	_____
<b>TAXES:</b>			<b>TRANSPORTATION:</b>		
Fed Inc/Soc Sec/Med (C)	_____	_____	Car Payments/Lease	_____	_____
Fed Inc/Soc Sec/Med (S)	_____	_____	Fuel	_____	_____
State Income (C)	_____	_____	Car Insurance	_____	_____
State Income (S)	_____	_____	Tax/Reg/License	_____	_____
Other Taxes _____	_____	_____	Repairs/Maintenance	_____	_____
Other Taxes _____	_____	_____	Other Car _____	_____	_____
<b>SAVINGS:</b>			<b>LIVING EXPENSES:</b>		
Retirement Plan (C)	_____	_____	Groceries	_____	_____
Retirement Plan (S)	_____	_____	Childcare	_____	_____
Investment/Savings	_____	_____	Child Support/Alimony	_____	_____
Other Savings _____	_____	_____	Clothing	_____	_____
Other Savings _____	_____	_____	Education	_____	_____
 			Medical/Dental	_____	_____
<b>INSURANCE:</b>			Other Required _____	_____	_____
Life (C)	_____	_____	 		
Life (S)	_____	_____	<b>DISCRETIONARY EXPENSES:</b>		
Disability (C)	_____	_____	Charity	_____	_____
Disability (S)	_____	_____	Personal Care	_____	_____
Health	_____	_____	Club Dues	_____	_____
Long Term Care	_____	_____	Dining Out	_____	_____
 			Gifts	_____	_____
<b>DEBT:</b>			Pets	_____	_____
Mortgage	_____	_____	Recreation	_____	_____
Home Equity Loan	_____	_____	Subscriptions	_____	_____
Credit Card Debt	_____	_____	Vacation	_____	_____
Student Loan	_____	_____	Other Discretionary _____	_____	_____
Other Debt _____	_____	_____	Other Discretionary _____	_____	_____

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