



PLANNING . ADVICE . WEALTH MANAGEMENT .

Living Expense Worksheet (Excludes Income Taxes)

Description		Current Monthly Expense	Description		Current Monthly Expense
1	Food, Groceries, Personal Care Items		28	Medical/Dental Expenses	
2	Home Mortgage (Principal & Interest)		29	Education - Books & Tuition	
3	Home Equity Line/Loan		30	Lessons (Music/Dancing/Sports)	
4	Property Taxes		31	Child Care / Babysitting	
5	Home Insurance		32	Children's Activities	
6	Water, Sewer, Sanitation		33	Club Dues	
7	Home Owner's Association		34	Entertainment (Dinners, Movies, etc.)	
8	Home Maintenance/Repair		35	Pocket Cash	
9	New Household Purchases		36	Clothing	
10	Gas & Electric		37	Cleaners/Laundry	
11	Telephone (home)		38	Subscriptions (magazines, newspaper, etc.)	
12	Telephone (cell)		39	Tolls, Parking, etc.	
13	Internet		40	Housekeeping	
14	Cable/Satellite Television		41	Vacations/Travel	
15	Automobile Loan		42	Gifts	
16	Automobile – Fuel		43	Employment Related Expenses	
17	Automobile - Other (Repairs, etc.)		44	Professional Dues	
18	Automobile Insurance		45	Charitable Donations	
19	Client #1 Life Insurance		46	Credit Cards	
20	Client #2 Life Insurance		47	Personal Care (Haircuts, etc.)	
21	Child's Life Insurance		48	Miscellaneous	
22	Medical Insurance		49	Client #1 Monthly Retirement Plan Contributions	
23	Dental Insurance		50	Client #2 Monthly Retirement Plan Contributions	
24	Vision Insurance		51	Monthly Contributions to After-Tax Accounts	
25	Disability Insurance		52	Monthly Contributions to Education Accounts	
26	Long Term Care Insurance		53	Monthly Contributions to Savings Accounts	
27	Liability Insurance		Total		

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