



CLIENT NAME: _____

Description	Monthly \$		Annual \$	Comments
Automobile Maintenance		x		
Automobile Payments		x		
Cell Phone		x		
Charity		x		
Cleaning		x		
Clothing		x		
Discretionary		x		
Dues & Publications		x		
Education		x		
Electrical		x		
Entertainment		x		
Food (dining out)		x		
Food (household)		x		
Fuel - Vehicles		x		
Garbage		x		
Gas / Heating Utilities		x		
Home Insurance / Renter's Insurance		x		
Household Expense		x		
Housing (including property taxes)		x		
Maintenance & Repairs		x		
Medical / Dental / Prescriptions		x		
Miscellaneous		x		
Mowing		x		
Other		x		
Personal Care		x		
Pets		x		
Snow Removal		x		
Telephone		x		
Travel		x		
Water		x		

Please provide details on loans: (beginning date, amount, interest rate, term in years, current balance)

Please provide details on insurance policies: latest policy deck page - includes detailed information

Notes:

--