## Professional Financial Services, inc.

## CLIENT NAME:

| Description | Monthly \$ |  |  | Annual \$ | Comments |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Automobile Maintenance |  | x | 12 | \$ 0.00 |  |
| Automobile Payments |  | x | 12 | \$ 0.00 |  |
| Cell Phone |  | x | 12 | \$ 0.00 |  |
| Charity |  | x | 12 | \$ 0.00 |  |
| Cleaning |  | x | 12 | \$ 0.00 |  |
| Clothing |  | x | 12 | \$ 0.00 |  |
| Discretionary |  | x | 12 | \$ 0.00 |  |
| Dues \& Publications |  | x | 12 | \$ 0.00 |  |
| Education |  | x | 12 | \$ 0.00 |  |
| Electrical |  | x | 12 | \$ 0.00 |  |
| Entertainment |  | x | 12 | \$ 0.00 |  |
| Food (dining out) |  | x | 12 | \$ 0.00 |  |
| Food (household) |  | x | 12 | \$ 0.00 |  |
| Fuel - Vehicles |  | x | 12 | \$ 0.00 |  |
| Garbage |  | x | 12 | \$ 0.00 |  |
| Gas / Heating Utilities |  | x | 12 | \$ 0.00 |  |
| Home Insurance / Renter's Insurance |  | x | 12 | \$ 0.00 |  |
| Household Expense |  | x | 12 | \$ 0.00 |  |
| Housing (including property taxes) |  | x | 12 | \$ 0.00 |  |
| Maintenance \& Repairs |  | x | 12 | \$ 0.00 |  |
| Medical / Dental / Prescriptions |  | x | 12 | \$ 0.00 |  |
| Miscellaneous |  | x | 12 | \$ 0.00 |  |
| Mowing |  | x | 12 | \$ 0.00 |  |
| Other |  | x | 12 | \$ 0.00 |  |
| Personal Care |  | x | 12 | \$ 0.00 |  |
| Pets |  | x | 12 | \$ 0.00 |  |
| Snow Removal |  | x | 12 | \$ 0.00 |  |
| Telephone |  | x | 12 | \$ 0.00 |  |
| Travel |  | x | 12 | \$ 0.00 |  |
| Water |  | X | 12 | \$ 0.00 |  |

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:

