



| Category | Current |
|------------------|---------|
| After-Tax Income | \$ |
| Other | \$ |
| TOTAL | \$ |

| Fixed Expenses | Monthly Cost |
|---------------------------|--------------|
| Mortgage/Rent | \$ |
| Real Estate Tax | \$ |
| Homeowners Insurance | \$ |
| Charitable Donations | \$ |
| Association Fees | \$ |
| Electricity | \$ |
| Gas | \$ |
| Trash Pickup | \$ |
| Water/Sewer | \$ |
| Cable/Phone/Internet | \$ |
| Cell Phone | \$ |
| Groceries | \$ |
| Healthcare - Dental | \$ |
| Healthcare - Prescription | \$ |
| Healthcare - Vision | \$ |
| Alimony | \$ |
| Child Support | \$ |
| Other | \$ |
| TOTAL | \$ |

| Discretionary Expenses | Monthly Cost |
|--------------------------------------|--------------|
| Child Activities | \$ |
| Child Allowance/expenses | \$ |
| Child Care | \$ |
| Child Tutor | \$ |
| Education | \$ |
| Dining Out | \$ |
| Entertainment/Recreation | \$ |
| Books/Magazine | \$ |
| Hobbies | \$ |
| Household Items | \$ |
| Laundry/Dry Cleaning | \$ |
| Personal Care (hair cut, nails, etc) | \$ |
| Pet Care | \$ |
| Public transportations | \$ |
| Vacation/Travel | \$ |
| Business Expenses | \$ |
| Clothing | \$ |
| Gym/Spa Membership | \$ |
| Gifts | \$ |
| Care for Parent/Other | \$ |
| Cash - Miscellaneous | \$ |
| Lawn Care | \$ |

| | |
|----------------------------|----|
| Maintenance - Major Repair | \$ |
| Maintenance - Regular | \$ |
| Furniture | \$ |
| Household Help | \$ |
| Other | \$ |
| TOTAL | \$ |

| Insurance Expenses | Monthly Cost |
|------------------------------|--------------|
| Health Insurance Premium | \$ |
| Health Savings Account (HSA) | \$ |
| Medicare Supplement | \$ |
| Life Insurance Policy #1 | \$ |
| Life Insurance Policy #2 | \$ |
| Disability Policy #1 | \$ |
| Disability Policy #2 | \$ |
| Long Term Care Policy #1 | \$ |
| Long Term Care Policy #2 | \$ |
| Umbrella Liability | \$ |
| Auto Insurance | \$ |
| TOTAL | \$ |

| Vehicle #1 Expenses | Monthly Cost |
|---------------------|--------------|
| Loan/Lease Payment | \$ |
| Fuel | \$ |
| Repairs/Maintenance | \$ |
| Tags/Registration | \$ |
| TOTAL | \$ |

| Vehicle #2 Expenses | Monthly Cost |
|---------------------|--------------|
| Loan/Lease Payment | \$ |
| Fuel | \$ |
| Repairs/Maintenance | \$ |
| Tags/Registration | \$ |
| TOTAL | \$ |

| Savings | Monthly Amount |
|------------------------------|----------------|
| Regular Savings Account | \$ |
| Emergency Savings Account | \$ |
| IRA/Roth IRA #1 | \$ |
| IRA/Roth IRA #2 | \$ |
| Investment Brokerage Account | \$ |
| Other | \$ |
| TOTAL | \$ |

| Category | Total |
|-------------------|-------|
| Total Income | \$ |
| Total Expenses | \$ |
| DIFFERENCE | \$ |