

Financial Planning Expense Worksheet

| | Monthly | Annually | | Monthly | Annually | | Monthly | Annually |
|-----------------------------|---------|----------|------------------------|---------|----------|----------------------|---------|----------|
| HOUSING | | | CLOTHING | | | ENTERTAINMENT | | |
| Mortgage | | | Husband | | | Dining Out | | |
| Community Dues | | | Wife | | | Event Tickets | | |
| Electricity/Gas | | | Children | | | Golf, Ect. | | |
| Water | | | TOTAL | | | Movies/Videos | | |
| Garbage Pick Up | | | FURNISHINGS | | | Other | | |
| Telephone | | | Indoor | | | TOTAL | | |
| Cable/Satellite TV | | | Outdoor | | | VACATIONS | | |
| Security System | | | TOTAL | | | Travel Tickets | | |
| Pool System | | | PERSONAL CARE | | | Hotels | | |
| Lawn System | | | Dry Cleaning | | | Food | | |
| Maid Service | | | Hair /Nails | | | Entertainment | | |
| Maintenance | | | Cosmetics | | | Auto | | |
| Property Taxes | | | Shoe Shine | | | Other | | |
| Pest/Bug Control | | | Health Club | | | TOTAL | | |
| Other | | | Misc. Cash | | | CHARITY | | |
| TOTAL | | | Other | | | House of Worship | | |
| CHILD CARE | | | TOTAL | | | Other | | |
| Support Payments | | | MEDICAL/DENTAL | | | TOTAL | | |
| Daycare | | | Vision | | | REINVESTMENTS | | |
| Sports Activities | | | Co-Pay | | | Dividends | | |
| Other | | | Deductible | | | Distributions | | |
| TOTAL | | | Medication/Vitamins | | | TOTAL | | |
| TRANSPORTATION | | | Other | | | GIFTS | | |
| Lon/Lease | | | TOTAL | | | Holidays | | |
| GAs | | | EDUCATION | | | Birthdays | | |
| Maintenance | | | Private School/College | | | Weddings | | |
| Tags/Inspection | | | Classes | | | Other | | |
| Other | | | Hobbies | | | TOTAL | | |
| TOTAL | | | Association Fees | | | PETS | | |
| FOOD & BEVERAGES | | | Other | | | Food | | |
| Groceries | | | TOTAL | | | Veterinarian | | |
| Household Supplies | | | Debt Payments | | | Other | | |
| Wine/ Beer Etc. | | | Student loans | | | TOTAL | | |
| Other | | | Credit cards | | | MISCELLANEOUS | | |
| TOTAL | | | Rental Mortgage | | | Support/Alimony | | |
| | | | Other | | | Personal Computer | | |
| | | | TOTAL | | | Other | | |
| | | | | | | TOTAL | | |