

Financial Planning

Annual Living Expenses

LIVING EXPENSES

Annual

Auto: Gas/Repairs	\$ _____
Children/Family	\$ _____
Clothing	\$ _____
Dues/Subscriptions	\$ _____
Entertainment/Dining	\$ _____
Food/Groceries	\$ _____
Gifts/Celebrations	\$ _____
Home Improvement/Purchases	\$ _____
Home Repair/Maintenance	\$ _____
Household Help	\$ _____
Insurance: Auto	\$ _____
Insurance: Homeowners	\$ _____
Insurance: Other	\$ _____
Insurance: Umbrella	\$ _____
Miscellaneous Cash	\$ _____
Other Living Expenses	\$ _____
Personal Care	\$ _____
Pet Care	\$ _____
Telephone/Cell/Internet	\$ _____
Travel/Vacations	\$ _____
Utilities	\$ _____

SAVINGS

Cash/Savings Accounts	\$ _____
Non-Retirement Investments	\$ _____