



# LEGACY ONE

## FINANCIAL

LIFE IN ABUNDANCE

## DREAM BIG BUDGET

Client's Name: \_\_\_\_\_

Date: \_\_\_\_\_

	Monthly	or	Annual		Monthly	or	Annual
<b>HOUSING</b>				<b>PERSONAL CARE AND CASH</b>			
Mortgage	_____		_____	Dry Cleaning	_____		_____
Condo Fees / Association Fees	_____		_____	Hair / Nails / Facials	_____		_____
Electricity / Gas	_____		_____	Cosmetics / Shoe Shine	_____		_____
Water	_____		_____	Massage	_____		_____
Garbage Removal	_____		_____	Health Club	_____		_____
Telephone / PC	_____		_____	Other	_____		_____
Cable / Sattelite TV / Internet	_____		_____	Total	_____		_____
Security System	_____		_____	<b>MEDICAL / DENTAL / VISION</b>			
Pool Service	_____		_____	Co-Pay(s) / Deductibles	_____		_____
Lawn Service	_____		_____	Prescriptions /	_____		_____
Maid Service	_____		_____	Health Care Costs	_____		_____
Maintenance / Improvements	_____		_____	Vitamins	_____		_____
Property Taxes	_____		_____	Other	_____		_____
Pest / Bug Service	_____		_____	Total	_____		_____
Homeowner's Insurance / Other	_____		_____	<b>EDUCATION / SELF IMPROVEMENT</b>			
Total	_____		_____	Private School / College	_____		_____
<b>CHILD CARE</b>				Classes / Books / Paper	_____		_____
Support Payments	_____		_____	Association Fees /	_____		_____
Daycare / Education	_____		_____	Subscriptions	_____		_____
Sports Activities	_____		_____	Hobbies / Other	_____		_____
Other	_____		_____	Total	_____		_____
Total	_____		_____	<b>INSTALLMENT DEBT PAYMENTS</b>			
<b>TRANSPORTATION</b>				Student Loans	_____		_____
Loan / Lease Payment #1	_____		_____	Credit Cards	_____		_____
Loan / Lease Payment #2	_____		_____	Other	_____		_____
Loan / Lease Payment #3	_____		_____	Total	_____		_____
Gasoline	_____		_____	<b>PROFESSIONAL SERVICES</b>			
Maintenance / Improvements	_____		_____	Financial Planner	_____		_____
Registration / Inspection /	_____		_____	Accountant	_____		_____
Excise Tax	_____		_____	Other	_____		_____
Car Insurance	_____		_____	Total	_____		_____
Other	_____		_____	<b>ENTERTAINMENT</b>			
Total	_____		_____	Dining Out	_____		_____
<b>GROCERIES</b>				Sports Tickets	_____		_____
Food / Beverages	_____		_____	Theater Tickets	_____		_____
Household Supplies	_____		_____	Recreation / Hobbies	_____		_____
Other	_____		_____	Movies / Videos	_____		_____
Other	_____		_____	Club Membership Fees	_____		_____
Total	_____		_____	Total	_____		_____
<b>CLOTHING</b>				<b>VACATIONS AND HOLIDAY</b>			
Client #1	_____		_____	Travel Tickets	_____		_____
Client #2	_____		_____	Hotels	_____		_____
Children	_____		_____	Food	_____		_____
Total	_____		_____	Entertainment	_____		_____
<b>FURNISHINGS</b>				Auto	_____		_____
Inside / Outside	_____		_____	Other	_____		_____
Total	_____		_____	Total	_____		_____

# DREAM BIG BUDGET (CONTINUED)

	Monthly	or	Annual		Monthly	or	Annual
<b>CHARITABLE CONTRIBUTIONS</b>				<b>CURRENT SAVINGS</b>			
Favorite Charity	_____		_____	IRA	_____		_____
Cash Donations	_____		_____	IRA	_____		_____
Other	_____		_____	Roth IRA	_____		_____
<b>Total</b>	<b>_____</b>		<b>_____</b>	Roth IRA	_____		_____
				Business Retirement Plan (401k/ SEP IRA / SIMPLE IRA)	_____		_____
<b>GIFTS</b>				Business Retirement Plan (401k/ SEP IRA / SIMPLE IRA)	_____		_____
Holidays	_____		_____	HSA	_____		_____
Birthdays	_____		_____	HSA	_____		_____
Weddings	_____		_____	Savings / Money Market	_____		_____
Other	_____		_____	Savings / Money Market	_____		_____
<b>Total</b>	<b>_____</b>		<b>_____</b>	Other	_____		_____
				Other	_____		_____
<b>PETS</b>				<b>Total</b>	<b>_____</b>		<b>_____</b>
Food	_____		_____				
Veterinarian	_____		_____				
Pet Insurance / Other	_____		_____				
<b>Total</b>	<b>_____</b>		<b>_____</b>				
				<b>DREAM BIG BUDGET AD INS</b>			
<b>MISCELLANEOUS</b>				Travel	_____		_____
Support / Alimony	_____		_____	Travel	_____		_____
Other	_____		_____	Travel	_____		_____
Other	_____		_____	New Car	_____		_____
<b>Total</b>	<b>_____</b>		<b>_____</b>	New Car	_____		_____
				New Car	_____		_____
				Home / Second Home(s)	_____		_____
				Home / Second Home(s)	_____		_____
				Home / Second Home(s)	_____		_____
				Remodels / Landscaping	_____		_____
				Remodels / Landscaping	_____		_____
				Remodels / Landscaping	_____		_____
				Celebration Parties	_____		_____
<b>LIFE INSURANCE PREMIUMS</b>				Celebration Parties	_____		_____
Life Insurance Policy #1	_____		_____	Celebration Parties	_____		_____
Life Insurance Policy #2	_____		_____	Big Purchases	_____		_____
Life Insurance Policy #3	_____		_____	Big Purchases	_____		_____
Life Insurance Policy #4	_____		_____	Big Purchases	_____		_____
<b>Total</b>	<b>_____</b>		<b>_____</b>	Other	_____		_____
				Other	_____		_____
<b>LONG TERM CARE PREMIUMS</b>				<b>Total</b>	<b>_____</b>		<b>_____</b>
LTC Policy #1	_____		_____				
LTC Policy #2	_____		_____				
<b>Total</b>	<b>_____</b>		<b>_____</b>				

Monthly      or      Annual



**LEGACY ONE**  
FINANCIAL

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