



Retire Intentionally Cash Flow Exercise

Client Name (s): _____ Date: ____/____/____

AVERAGE MONTHLY DEBITS*	\$
Mortgage (principal and interest) or rent	
Other housing expenses ie; Utilities, Association fees, other	
Vehicle/ transportation, insurance payments	
SUBTOTAL	

AVERAGE MONTHLY CREDIT CARDS	\$
Credit card #1	
Credit card #2	
Credit card #3	
SUBTOTAL	

OTHER MONTHLY CHECKS AND CASH	\$
Charitable Contributions-Church, other regular donations	
Gifts: weddings, birthdays, etc.	
Discretionary cash (ATM or other)	
Other:	
SUBTOTAL	

**Don't double count if these are paid on credit card or quarterly/annual payment*

TOTAL Average Monthly Expenses: _____



PERIODIC EXPENSES

Do not include here if it was part of your monthly total.

PERIODIC EXPENSES	ANNUAL AMOUNT
Property Taxes	
Auto: registration, licenses, maintenance, Insurance, etc.	
Vacation/Travel (<i>This is specific to an annual vacation goal</i>)	
Charitable Contributions	
Christmas Gifts	
Homeowners or other property insurance	
House-Maintenance and Repairs	
Other	
Other	
Other	
Total Annual Periodic Expenses	
Subtotal Of Monthly Expenses x 12 =	

TOTAL AVERAGE ANNUAL EXPENSES	
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Additional Notes:

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