



# Expense Worksheet

Directions: Below is a list of potential expenses in several different categories. Please fill out to the best of your ability using annual total amount. Please call 360-714-3378 with any questions.

## Housing

Mortgage	_____
Property Taxes	_____
Homeowner's Insurance	_____
Condo / Association Fees	_____
Electricity/ Gas / Water	_____
Garbage Removal	_____
Telephone/ PC	_____
Cable/ Internet	_____
Security System	_____
Pool / Lawn Service	_____
Maid Service	_____
Improvements	_____
Pest/ Bug Service	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Child Care

Support Payments	_____
Daycare/ Education	_____
Sport Activities	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Transportation

Loan/ Lease Payment #1	_____
Loan/ Lease Payment #2	_____
Auto Insurance	_____
Gasoline	_____
Improvements	_____
Registration/ Inspection	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Groceries

Food/ Beverages	_____
Household supplies	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Savings

Retirement #1	_____
Retirement #2	_____
Investment #1	_____
Investment #2	_____
Education Savings #1	_____
Education Savings #2	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Personal Care

Clothing	_____
Hair/ Nails/ Facials	_____
Cosmetics	_____
Massage	_____
Health Club	_____
Furnishings In & Out	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Medical/Dental/Vision

Co-Pay(s)/ Deductibles	_____
Prescriptions	_____
Health Insurance	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Education/Self-Improvement

Private School/ College	_____
Classes/ Books/ Paper	_____
Subscriptions	_____
Hobbies/ Other	_____
<b>Total</b>	<b>\$ -</b>

## Installment Debt Payments

Student Loans	_____
Credit Cards	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Entertainment

Dining Out	_____
Sports / Theatre Tickets	_____
Recreation/ Hobbies	_____
Streaming Services	_____
Club Membership Fees	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Vacation & Holiday

Travel Tickets	_____
Hotels	_____
Food	_____
Entertainment	_____
Auto	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Gifts

Holidays	_____
Birthdays	_____
Weddings	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

## Pets

Food	_____
Veterinarian	_____
Pet Insurance/ Other	_____
<b>Total</b>	<b>\$ -</b>

## Miscellaneous

Support/ Alimony	_____
Charitable Contributions	_____
Other	_____
<b>Total</b>	<b>\$ -</b>

**GRAND TOTAL** \$ -

In order to help protect your personal information, please do NOT email this back to us, unless you use our secure email system. If you are uncertain whether you have the secure email, please call our office or email us requesting a secure email. Thank you.

