

# Monthly Expenses

## Housing

\_\_\_\_\_ Associations  
\_\_\_\_\_ Flood Insurance  
\_\_\_\_\_ Home Insurance  
\_\_\_\_\_ Maintenance  
\_\_\_\_\_ Mortgage  
\_\_\_\_\_ Pest Control  
\_\_\_\_\_ PMI  
\_\_\_\_\_ Property Tax  
\_\_\_\_\_ Lawn  
\_\_\_\_\_ Repairs  
\_\_\_\_\_ Storage  
\_\_\_\_\_ Pool  
\_\_\_\_\_ Security  
  
\$ \_\_\_\_\_ **TOTAL**

## Transportation

\_\_\_\_\_ Auto Club  
\_\_\_\_\_ Car 1 PMT  
\_\_\_\_\_ Car 2 PMT  
\_\_\_\_\_ Gas  
\_\_\_\_\_ Insurance  
\_\_\_\_\_ Maintenance  
\_\_\_\_\_ Oil and Tires  
\_\_\_\_\_ Repair  
\_\_\_\_\_ Registration  
\_\_\_\_\_ Other  
  
\$ \_\_\_\_\_ **TOTAL**



## Pets

\_\_\_\_\_ Veterinarian  
\_\_\_\_\_ Medicine  
\_\_\_\_\_ Boarding  
\_\_\_\_\_ Grooming  
\_\_\_\_\_ Training  
\_\_\_\_\_ Food  
  
\$ \_\_\_\_\_ **TOTAL**

## Utilities

\_\_\_\_\_ Cable TV  
\_\_\_\_\_ Cell Phone  
\_\_\_\_\_ Electricity  
\_\_\_\_\_ Internet  
\_\_\_\_\_ Phone  
\_\_\_\_\_ Trash  
\_\_\_\_\_ Water  
\_\_\_\_\_ Netflix  
\_\_\_\_\_ Other  
  
\$ \_\_\_\_\_ **TOTAL**

## Medical

\_\_\_\_\_ Contacts  
\_\_\_\_\_ Co-payments  
\_\_\_\_\_ Dental Insurance  
\_\_\_\_\_ DME  
\_\_\_\_\_ Glasses  
\_\_\_\_\_ Health Insurance  
\_\_\_\_\_ Hearing Aid  
\_\_\_\_\_ LTC Insurance  
\_\_\_\_\_ LTD Insurance  
\_\_\_\_\_ Prescriptions  
\_\_\_\_\_ STD Insurance  
\_\_\_\_\_ Transportation  
\_\_\_\_\_ Flex  
  
\$ \_\_\_\_\_ **TOTAL**

## Food and Household

\_\_\_\_\_ Costco/BJ  
\_\_\_\_\_ Decoration  
\_\_\_\_\_ Groceries  
\_\_\_\_\_ Lunch  
\_\_\_\_\_ Restaurant  
\_\_\_\_\_ Walmart  
\_\_\_\_\_ Dating  
\_\_\_\_\_ Cleaning  
\_\_\_\_\_ Warranties  
\_\_\_\_\_ Amazon  
  
\$ \_\_\_\_\_ **TOTAL**

## Life Insurance

\_\_\_\_\_ Cash Value  
\_\_\_\_\_ Cash Value  
\_\_\_\_\_ Group Term  
\_\_\_\_\_ Group Term  
\_\_\_\_\_ Ind. Term  
\_\_\_\_\_ Ind. Term  
\_\_\_\_\_ Other  
  
\$ \_\_\_\_\_ **TOTAL**

## Health and Beauty

\_\_\_\_\_ Clothing  
\_\_\_\_\_ Dry Cleaning  
\_\_\_\_\_ Hair Cuts  
\_\_\_\_\_ Health Club  
\_\_\_\_\_ Laundry  
\_\_\_\_\_ Make-up  
\_\_\_\_\_ Nails  
\_\_\_\_\_ Salon  
\_\_\_\_\_ Shoes  
\_\_\_\_\_ Waxing  
  
\$ \_\_\_\_\_ **TOTAL**

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Securities offered through LPL Financial, Member FINRA/SIPC. Investment Advice offered through Lifespan Financial Strategies, Inc. a registered investment advisor and separate entity from LPL Financial.

## Children's Expenses

- \_\_\_\_\_ Allowances
  - \_\_\_\_\_ Birthday Party
  - \_\_\_\_\_ Braces
  - \_\_\_\_\_ Child Support
  - \_\_\_\_\_ Clubs
  - \_\_\_\_\_ Day Care
  - \_\_\_\_\_ Religious
  - \_\_\_\_\_ School Lunch
  - \_\_\_\_\_ Sports
  - \_\_\_\_\_ Summer Camp
  - \_\_\_\_\_ Tuition
  - \_\_\_\_\_ Tutoring
  - \_\_\_\_\_ Uniforms
  - \_\_\_\_\_ Other
- \$ \_\_\_\_\_ **TOTAL**

## Savings

- \_\_\_\_\_ Bank Savings
  - \_\_\_\_\_ Credit Union
  - \_\_\_\_\_ Emergency
  - \_\_\_\_\_ IRA
  - \_\_\_\_\_ Kid's College
  - \_\_\_\_\_ Retirement
  - \_\_\_\_\_ Roth IRA
  - \_\_\_\_\_ Variable Annuity
  - \_\_\_\_\_ Other
  - \_\_\_\_\_ Other
- \$ \_\_\_\_\_ **TOTAL**

## Recreation

- \_\_\_\_\_ Entertainment
  - \_\_\_\_\_ Dining Out
  - \_\_\_\_\_ Hobbies
  - \_\_\_\_\_ Vacations
  - \_\_\_\_\_ Membership
  - \_\_\_\_\_ Season Tickets
  - \_\_\_\_\_ Books/Mag
  - \_\_\_\_\_ Computer
  - \_\_\_\_\_ Toys
- \$ \_\_\_\_\_ **TOTAL**

## Debt Service

- \_\_\_\_\_ Credit Cards
  - \_\_\_\_\_ Equity Line
  - \_\_\_\_\_ Student Loan
  - \_\_\_\_\_ Other
  - \_\_\_\_\_ Other
- \$ \_\_\_\_\_ **TOTAL**

## Financial

- \_\_\_\_\_ Planner
  - \_\_\_\_\_ Accountant
  - \_\_\_\_\_ Attorney
  - \_\_\_\_\_ Check
  - \_\_\_\_\_ Fee
  - \_\_\_\_\_ Credit
  - \_\_\_\_\_ Fees
  - \_\_\_\_\_ Account. Fee
  - \_\_\_\_\_ Cust. Fees
  - \_\_\_\_\_ Safety Box
  - \_\_\_\_\_ Tax Prep
  - \_\_\_\_\_ PPD Legal
  - \_\_\_\_\_ Other
- \$ \_\_\_\_\_ **TOTAL**

## Miscellaneous

- \_\_\_\_\_ Alimony
  - \_\_\_\_\_ Anniversary
  - \_\_\_\_\_ Charity
  - \_\_\_\_\_ Gifts
  - \_\_\_\_\_ Holiday Gift
  - \_\_\_\_\_ Newspaper
  - \_\_\_\_\_ Parties
  - \_\_\_\_\_ Postage
  - \_\_\_\_\_ Support
  - \_\_\_\_\_ Tithe
  - \_\_\_\_\_ Weekly \$
  - \_\_\_\_\_ Union Dues
  - \_\_\_\_\_ Work Supp
  - \_\_\_\_\_ Lottery Tks
  - \_\_\_\_\_ Cigarettes
  - \_\_\_\_\_ Alcohol + Other
  - \_\_\_\_\_ APPS
  - \_\_\_\_\_ Netflix
  - \_\_\_\_\_ Games
  - \_\_\_\_\_ Music Subscriptions
  - \_\_\_\_\_ Other
- \$ \_\_\_\_\_ **TOTAL**

**You spend  
this much  
each month...**

**GRAND TOTAL**

\$ \_\_\_\_\_

