



LEGACY ONE

FINANCIAL

LIFE IN ABUNDANCE

TIGHTEN UP BUDGET

SPEND LESS TO SAVE MORE!

Client's Name: _____

Date: _____

	Monthly	or	Annual		Monthly	or	Annual
HOUSING				PERSONAL CARE AND CASH			
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 / Satellite TV / Internet	_____		_____	Total	_____		_____
Security System	_____		_____	MEDICAL / DENTAL / VISION			
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	_____		_____	EDUCATION / SELF IMPROVEMENT			
Total	_____		_____	Private School / College	_____		_____
CHILD CARE				Classes / Books / Paper	_____		_____
Support Payments	_____		_____	Association Fees /	_____		_____
Daycare / Education	_____		_____	Subscriptions	_____		_____
Sports Activities	_____		_____	Hobbies / Other	_____		_____
Other	_____		_____	Total	_____		_____
Total	_____		_____	INSTALLMENT DEBT PAYMENTS			
TRANSPORTATION				Student Loans	_____		_____
Loan / Lease Payment #1	_____		_____	Credit Cards	_____		_____
Loan / Lease Payment #2	_____		_____	Other	_____		_____
Loan / Lease Payment #3	_____		_____	Total	_____		_____
Gasoline	_____		_____	PROFESSIONAL SERVICES			
Maintenance / Improvements	_____		_____	Financial Planner	_____		_____
Registration / Inspection /	_____		_____	Accountant	_____		_____
Excise Tax	_____		_____	Other	_____		_____
Car Insurance	_____		_____	Total	_____		_____
Other	_____		_____	ENTERTAINMENT			
Total	_____		_____	Dining Out	_____		_____
GROCERIES				Sports Tickets	_____		_____
Food / Beverages	_____		_____	Theater Tickets	_____		_____
Household Supplies	_____		_____	Recreation / Hobbies	_____		_____
Other	_____		_____	Movies / Videos	_____		_____
Other	_____		_____	Club Membership Fees	_____		_____
Total	_____		_____	Total	_____		_____
CLOTHING				VACATIONS AND HOLIDAY			
Client #1	_____		_____	Travel Tickets	_____		_____
Client #2	_____		_____	Hotels	_____		_____
Children	_____		_____	Food	_____		_____
Total	_____		_____	Entertainment	_____		_____
FURNISHINGS				Auto	_____		_____
Inside / Outside	_____		_____	Other	_____		_____
Total	_____		_____	Total	_____		_____

TIGHTEN UP BUDGET (CONTINUED)

	Monthly	or	Annual		Monthly	or	Annual
CHARITABLE CONTRIBUTIONS				CURRENT SAVINGS			
Favorite Charity	_____		_____	IRA	_____		_____
Cash Donations	_____		_____	IRA	_____		_____
Other	_____		_____	Roth IRA	_____		_____
Total	_____		_____	Roth IRA	_____		_____
GIFTS				Business Retirement Plan (401k/ SEP IRA / SIMPLE IRA)	_____		_____
Holidays	_____		_____	Business Retirement Plan (401k/ SEP IRA / SIMPLE IRA)	_____		_____
Birthdays	_____		_____	HSA	_____		_____
Weddings	_____		_____	HSA	_____		_____
Other	_____		_____	Savings / Money Market	_____		_____
Total	_____		_____	Savings / Money Market	_____		_____
PETS				Other	_____		_____
Food	_____		_____	Other	_____		_____
Veterinarian	_____		_____	Total	_____		_____
Pet Insurance / Other	_____		_____	LIFE INSURANCE PREMIUMS			
Total	_____		_____	Life Insurance Policy #1	_____		_____
MISCELLANEOUS				Life Insurance Policy #2	_____		_____
Support / Alimony	_____		_____	Life Insurance Policy #3	_____		_____
Other	_____		_____	Life Insurance Policy #4	_____		_____
Other	_____		_____	Total	_____		_____
Other	_____		_____	LONG TERM CARE PREMIUMS			
Total	_____		_____	LTC Policy #1	_____		_____
				LTC Policy #2	_____		_____
				Total	_____		_____
				<div style="display: flex; justify-content: space-between; width: 100%;"> Monthly or Annual </div>			
				Grand Total	_____		_____



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FINANCIAL

(805) 330-9680

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