

**MONTHLY SPENDING: HOUSING**

Category	Current	In Retirement
Mortgage Payment (P&I)/Rent	\$	\$
Electricity	\$	\$
Gas/Oil	\$	\$
Water/Sewer/Trash	\$	\$
Maintenace & Improvements	\$	\$
Cable & Internet	\$	\$
Appliances & Furniture	\$	\$
Phone	\$	\$
Lawn & Garden Care	\$	\$
Household Supplies	\$	\$
Umbrella Coverage	\$	\$
Property Tax & Insurance	\$	\$
	\$	\$
<b>TOTAL:</b>	<b>\$</b>	<b>\$</b>

**MONTHLY SPENDING: HEALTH AND MEDICAL**

Category	Current	In Retirement
Medical/Dental Visits	\$	\$
Medication & Supplements	\$	\$
Health Insurance	\$	\$
Life Insurance	\$	\$
Long Term Care Insurance	\$	\$
Health/Fitness Club	\$	\$
	\$	\$
<b>TOTAL:</b>	<b>\$</b>	<b>\$</b>

**MONTHLY SPENDING: TRANSPORTATION**

Category	Current	In Retirement
Auto Payments	\$	\$
Fuel	\$	\$
Public Transit/Parking	\$	\$
Repairs & Maintenance	\$	\$
Taxes & Registration	\$	\$
Auto Insurance	\$	\$
	\$	\$
<b>TOTAL:</b>	<b>\$</b>	<b>\$</b>

**MONTHLY SPENDING: FINANCIAL**

Category	Current	In Retirement
Retirement & Investment Savings	\$	N/A
Other Debt (not incl. mortgage)	\$	\$
	\$	\$
<b>TOTAL:</b>	<b>\$</b>	<b>\$</b>

**MONTHLY SPENDING: DAILY LIVING**

Category	Current	In Retirement
Groceries	\$	\$
Dining	\$	\$
Personal Products	\$	\$
Clothing	\$	\$
Dry Cleaning	\$	\$
Salon/Barber Visits	\$	\$
	\$	\$
<b>TOTAL:</b>	<b>\$</b>	<b>\$</b>

**MONTHLY SPENDING: FAMILY CARE**

Category	Current	In Retirement
Tuition & Education	\$	\$
Childcare	\$	\$
Eldercare	\$	\$
Pets	\$	\$
	\$	\$
<b>TOTAL:</b>	<b>\$</b>	<b>\$</b>

**MONTHLY SPENDING: DISCRETIONARY**

Category	Current	In Retirement
Media	\$	\$
Entertainment	\$	\$
Gifts	\$	\$
Hobbies	\$	\$
Travel & Vacation	\$	\$
Recreational Vehicle Expense	\$	\$
Vacation Property/2nd Home Expense	\$	\$
Dues & Subscriptions	\$	\$
Charitable Donations	\$	\$
	\$	\$
<b>TOTAL:</b>	<b>\$</b>	<b>\$</b>

**MONTHLY SPENDING: MISCELLANEOUS**

Category	Current	In Retirement
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
<b>TOTAL:</b>	<b>\$</b>	<b>\$</b>

	Current	In Retirement
<b>TOTAL MONTHLY SPENDING:</b>	<b>\$</b>	<b>\$</b>



204 Towne Village Drive • Cary, NC 27513  
T 919.460.4688 • F 919.460.3989 • sgfnc.com