

Personal Financial Plan

Expense Worksheet	Estimated Monthly Expenses			
Item	Now	Retirement	Survivor Now	Survivor Retirement
Totals:	\$0	\$0	\$0	\$0
You: 10% of Income				
Mortgage, Rent or Lease Payment				
Gas/Heating				
Electric				
Telephone				
Cell Phone				
Cable				
Internet				
Water/Sewage				
Trash				
Groceries				
Household Supplies				
Eating Out				
Domestic Help (Landscaping, Cleaning, etc.)				
Property Improvement/Upkeep				
Home Furnishings				
Property Taxes				
Laundry/Dry Cleaning				
Clothing Individual 1				
Clothing Individual 2				
Automobile 1 Gas/Oil				
Automobile 2 Gas/Oil				
Automobile Repairs				
Automobile Insurance				
Automobile Loan Payment				
Parking Fees/Tolls				
Child Care				
School Fees				
Child's Clothing				
Child Support/Alimony				
Special Events				
College Funds				
Gifts/Birthdays				
Holidays				
Entertainment				
Vacations				
Hobbies				
Charitable Contributions				
Memberships/Dues				
Books/Subscriptions/Papers				
Pet Food/Veterinary Expenses				
Credit Card 1 Payment				
Credit Card 2 Payment				
Credit Card 3 Payment				
Boat/RV Payment				
Other Loan Payments				
Medical Insurance				
Homeowners Insurance				
Life Insurance				
Medical/Dental Expenses				
Other Expenses				