

EXPENSE WORKSHEET



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ONGOING EXPENSES

Expense	Monthly	Annual
Taxes (Variable with Income)		
Federal	\$	\$
State	\$	\$
Local	\$	\$
TOTAL TAXES	\$ -	\$ -
Household (Essential)		
Mortgage/Rent	\$	\$
Property Taxes	\$	\$
Maintenance	\$	\$
Home/Renter's Insurance	\$	\$
Electricity	\$	\$
Oil/Gas	\$	\$
Water/Garbage/Sewer	\$	\$
Telephone/Cell Phone	\$	\$
Cable/Internet	\$	\$
Other:	\$	\$
Total	\$ -	\$ -
Automobile & Transportation (Essential)		
Car Payment	\$	\$
Maintenance/Repairs	\$	\$
Gasoline	\$	\$
License/Registration	\$	\$
Insurance	\$	\$
Other:	\$	\$
Total	\$ -	\$ -
Living Expenses (Essential)		
Food	\$	\$
Clothing	\$	\$
Beauty/Barber	\$	\$
Other:	\$	\$
Total	\$ -	\$ -

ONE-TIME EXPENSES (E.G., WEDDING, COLLEGE TUITION)

Expense	Amount
	\$
	\$
	\$

Securities offered through LPL Financial, Member FINRA/SIPC

Expense	Monthly	Annual
Medical/Health (Essential)		
Health Insurance	\$	\$
Life Insurance	\$	\$
Long-Term Care Insurance	\$	\$
Disability Insurance	\$	\$
Medical Expenses	\$	\$
Dental Expenses	\$	\$
Other:	\$	\$
Total	\$ -	\$ -
Family Care (Essential)		
Parent/Child Care	\$	\$
Education	\$	\$
Clothing (kids)	\$	\$
Other:	\$	\$
Total	\$ -	\$ -
TOTAL ESSENTIAL		
	\$ -	\$ -
Discretionary		
Entertainment	\$	\$
Dining Out	\$	\$
Hobbies	\$	\$
Publications	\$	\$
Education	\$	\$
Traveling/Vacations	\$	\$
Charitable Donations	\$	\$
Gifts	\$	\$
Professional/Social Dues	\$	\$
Gym Membership	\$	\$
Other:	\$	\$
Other:	\$	\$
TOTAL DISCRETIONARY	\$ -	\$ -
TOTAL EXPENSES	\$ -	\$ -

Expense	Amount
	\$
	\$
	\$