

Living Expense Worksheet CONFIDENTIAL

Your name <input style="width: 95%; height: 20px;" type="text"/>	Date completed <input style="width: 95%; height: 20px;" type="text"/>
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BASIC LIVING EXPENSES	Amount		Frequency			
	Primary House	Secondary				
Housing						
Mortgage, rent and/or line of credit	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Property and school taxes	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
House or Renters Insurance	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Internet and phone (NOT cable TV or cell phones)	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Water, gas & electric	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Maintenance (HOA fees, repairs, lawn, etc.)	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Transportation						
Loan or lease payments	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Insurance	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Gas	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Maintenance / Other	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Food						
Groceries	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Pet food	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Dining out and lunch at work*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Personal Expenses (Discretionary Expenses)						
Recreation (Club/gym membership, hobbies, etc.)*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Entertainment (Cable, Netflix, theater, sporting events, etc.)*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Personal (Clothing, health and beauty)*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Childcare/babysitting*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Education expns: Tuition, loans, rent, etc., NOT 529 svgs*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Cellular phones and tablets*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Travel*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Payments against credit card with rolling balance	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Other:	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Other:	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Healthcare						
Medical Insurance (not paid pre-tax from your payroll)	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Co-pays, prescriptions, etc.	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Pet healthcare	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Insurance to protect lifestyle						
Life Insurance	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Disability and Long Term Care Insurance	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Gifts and Charitable Contributions						
Gifts (including b-days and holidays)*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
Charitable contributions*	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly
"Phantom" or other miscellaneous expenses						
Random stuff difficult to account for	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	___ Weekly	___ Monthly	___ Quarterly	___ Yearly

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