



**Client Detailed Expense/Budget Worksheet**  
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	Detailed			Scenario 2		
	Amount	Frequency	Annual Amount	Amount	Frequency	Annual Amount
<b>Housing</b>						
Mortgage						
Rent						
Real estate taxes						
Condo, co-op fees						
Utilities (gas, heat, electricity, water, etc.)						
Internet, cable						
Home improvement, repairs						
Lawn or snow services						
Housekeeping						
Home, rental insurance premium						
Umbrella insurance premium						
<b>Food</b>						
Groceries						
Dining out						
<b>Medical expenses</b>						
Medical, dental, vision premium						
Medical expenses						
Medicine, prescriptions						
Alternative treatments (chiropractor, massage, etc.)						
<b>Transportation</b>						
Auto insurance premium						
Auto lease						
Gas						
Auto maintenance, repairs, etc						
Registration, license						
Bus, taxi, train, parking						
Future vehicle purchase (Start and End dates in the Frequency section)						
<b>Personal</b>						
Financial planning services						
Professional services (tax preparation, attorney fees, etc.)						
Clothing						
Phone(s)						
Home décor, furnishings						
Household supplies						
Personal care (hair care, spa, dry cleaning, etc.)						
Gifts to charities						
Gifts to family and others						
<b>Personal (continued)</b>						
Allowances						
Memberships and dues (e.g., gym, clubs, professional)						
Subscriptions						
Unreimbursed employment expense						



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	Detailed			Scenario 2		
	Amount	Frequency	Annual Amount	Amount	Frequency	Annual Amount
Miscellaneous						
<b>Entertainment</b>						
Hobbies						
Children's activities						
Tickets (music, movies, events, etc.)						
Vacation, travel						
Other entertainment						
<b>Other Expenses</b>						
Education costs (Start and End dates in the Frequency section)						
Dependent care, in-home care (Start and End dates in the Frequency section)						
Alimony						
Child support						
Pet care (vet, grooming, pet food, etc.)						
Life insurance premium						
Disability insurance premium						
Long term care premium						
Other						
<b>Grand Total</b>						