



Lifestyle Expense Worksheet

Client Name _____

Household Expenses	Monthly	Annual
Rent/Lease Payment	\$	\$
Association Fees	\$	\$
Property Taxes	\$	\$
Property Improvements and Upkeep	\$	\$
Home Furnishings	\$	\$
Utilities		
Telephone	\$	\$
Cell Phone	\$	\$
Gas	\$	\$
Electric	\$	\$
Water/Trash	\$	\$
Cable TV/ Satellite	\$	\$
Internet Service	\$	\$
Domestic Help	\$	\$
Food and Household Incidentals		
Groceries	\$	\$
Eating Out	\$	\$
Vitamins/Supplements	\$	\$
Household Supplies	\$	\$

Auto Operating and Maintenance	Monthly	Annual
Gas/Oil	\$	\$
Repair	\$	\$
Car Wash	\$	\$
Tags/Emissions	\$	\$
Parking Tolls	\$	\$

Personal Expenses	Monthly	Annual
Clothes & Personal Items	\$	\$
Personal Maintenance	\$	\$
Medical Expenses/Prescriptions	\$	\$
Laundry/Dry Cleaning	\$	\$
Entertainment	\$	\$
Hobbies	\$	\$
Memberships/Dues	\$	\$
Vacations	\$	\$
Books, Papers, Subscriptions	\$	\$
Pet Expenses	\$	\$
Supplies	\$	\$
Gifts/Birthday	\$	\$
Holidays	\$	\$
Charitable Contributions/ Tithe	\$	\$
Alimony	\$	\$
Child Support	\$	\$
Other Court Ordered Expenses	\$	\$
Other Expenses	\$	\$
Income Taxes	\$	\$
Tax Prep Fees	\$	\$
Attorney Fees	\$	\$

Insurance Premiums	Monthly	Annual
Life Insurance Premiums	\$	\$
Long Term Care Premiums	\$	\$
Medical Insurance Premiums	\$	\$
Auto Insurance Premiums	\$	\$
House Insurance Premiums	\$	\$
2nd Home Insurance Premium	\$	\$

Loan Payments	Monthly Payment	Remaining Balance	Interest Rate	Expected Payoff Date
Mortgage Payment	\$	\$		
Vacation Home Payment	\$	\$		
Auto Loan 1 Payment	\$	\$		
Auto Loan 2 Payment	\$	\$		
RV Payment	\$	\$		
Boat Payment	\$	\$		
Loan 1 Payment	\$	\$		
Loan 2 Payment	\$	\$		
Loan 3 Payment	\$	\$		
Loan 4 Payment	\$	\$		
Other Loan Payment	\$	\$		

Goals & Dreams	Monthly amt	Annual Amount	Upfront Cost	Expected Date of Purchase
Goal 1	\$	\$		
Goal 2	\$	\$		
Goal 3	\$	\$		
Goal 4	\$	\$		
Goal 5	\$	\$		
Goal 6	\$	\$		