

ANNUAL LIVING EXPENSE (today's dollars)

Income

Pension
Social Security
Additional Income

Client

\$

Pension
Social Security
Additional Income

Co-Client

\$

Expense Worksheet q Monthly or q Annually

Housing Expenses

Rent or Mortgage
Improvements, Maintenance
Utilities (power, water, garbage, phone, cable, alarm)
Furniture, Appliances, Household Goods
Services (housekeeper, gardener)
Property Taxes
Other (Insurance, Condo/Homeowners fee)

NOW

RETIREMENT

SURVIVOR
(optional)

Food

Groceries
Dining Out (coffee, snacks)

Transportation

Gas & Oil
Auto Insurance
Repairs, Maintenance
Parking, Tolls, Mass Transit
DMV Registration
Car Payments

Personal Expenses

Personal Items, Clothing
Personal Care
Pets / Vet Bills
Recreation, Entertainment
Gifts (non charitable donations)
Charitable Donations
Books, Subscriptions, Hobby Expenses
Childcare
Travel & Vacation
Life & Disability Insurance Premiums
Other

Medical Expenses

Medical & Dental Insurance
Medical, Dental, Vision, Chiropractor expenses
Prescriptions

TOTAL

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