

# Client Data Form – Financial Planning | Part C | Personal Expenses

Category	Description	Weekly	Fortnightly	Monthly	Annual
Personal	Gifts/presents/Christmas	\$	\$	\$	\$
	Vacations/holidays	\$	\$	\$	\$
	Subscriptions/books/newspapers	\$	\$	\$	\$
	Life/TPD/trauma/ income protect.	\$	\$	\$	\$
	Other:	\$	\$	\$	\$
Other	Pets/vet fees	\$	\$	\$	\$
	Charities/donations	\$	\$	\$	\$
	Miscellaneous:	\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
Totals		\$	\$	\$	\$

Additional details:

Notes