

Family Expense Worksheet

EXPENSES - Current Year Estimate		Monthly \$	Annual \$
Household:	Rent/Mortgage (Payoff Date: DD/MM/YY)		
	Real Estate Tax		
	Personal Property Tax (i.e. Auto)		
	HOA/Condo Fees		
	Improvements		
	Furnishings		
	Maintenance		
	Lawn Care/Landscaping		
	Housekeeping		
	Child Care		
	Legal		
	Accounting/Tax Preparation		
	Other		
2nd Property:	Rent/Mortgage (Payoff Date: DD/MM/YY)		
	Real Estate Tax		
	HOA/Condo Fees		
	Improvements		
	Furnishings		
	Maintenance		
	Lawn Care/Landscaping		
	Housekeeping		
	Other		
Utilities:	Electricity		
	Gas		
	Oil/Heating Fuel		
	Cell Phone		
	Trash Removal		
	Water/Sewer		
	Internet/Phone/Cable		
	Other		
Daily Living:	Groceries		
	Personal Supplies		
	Salon/Personal Care		
	Other		
Debt Management:	Auto Loan #1:		
	Auto Loan #2:		
	401k Loan:		
	Credit Card #1:		
	Credit Card #2:		
	Credit Card #3:		
	Student Loans:		
	Other:		
	Subtotal	\$	\$

Expense Worksheet (continued)

EXPENSES - Current Tax Year Estimate		Monthly \$	Annual \$
<u>Automobiles:</u>	Fuel		
	Service & Repairs		
	Other (i.e. Replacement every 5 years)		
<u>Insurance:</u>	Homeowner's Insurance		
	Auto Insurance		
	Health/Medical Insurance		
	Medical Out-of-Pocket Expenses		
	Prescription Out-of-Pocket Expenses		
	Other Medical Health Expenses (i.e. Prescriptions)		
	Long-Term Care Insurance		
	Life Insurance		
	Disability Insurance		
	Personal Liability/Umbrella Insurance		
	Other (i.e. FEMA Flood Insurance)		
<u>Dues/Subscriptions:</u>	Club Memberships		
	Gym Memberships		
	Newspaper/Magazine		
	Other		
<u>Entertainment:</u>	Dining Out		
	Dates/Outings		
	Hobbies		
	Other		
<u>Clothing:</u>	Clothes, Shoes, Jewelry, Etc...		
<u>Travel:</u>	Hotel, Flight, Vacation Spending, Etc...		
<u>Gifting:</u>	Holidays, Birthdays, Etc...		
<u>Charitable Giving:</u>	Cash, Donation of Items, Etc...		
<u>One-Off Expenses</u>	Home improvements		
	College Tuition		
	Wedding		
	Car 1 replacement every () years		
	Car 2 replacement every () years		
	Other		
<u>Miscellaneous</u>	Other - Home Security		
	Other - Home Pest Treatment		
	Other - Auto Registrations		
	Other - Vacation Home Expenses		
	Other- Misc. Costs		
	Total	\$	\$

Note: If more convenient, feel free to lump multiple expenses into the "credit card" category, modify as needed, or simply provide a total monthly spending amount and/or goal.

CLICK THE SUBMIT BUTTON BELOW TO SEND THIS FORM TO MINK WEALTH FOR REVIEW.