



Expenses

Current Income

Client Net Wages	\$	
Other Income		
Spouse Net Wages		
Other Income		
Total Income		
Investment Income		
Rental Income		

Retirement Income

Client Social Security	\$	
Client Other Income		
Client Pension		
Spouse Social Security		
Spouse Other Income		
Spouses Pension		
Rental Income		
Investment Income		

Home

	Current	Retirement
1st Mortgage		
Years Left		
2nd Mortgage		
Improvements		
Taxes		
Maintenance		
	\$ -	\$ -

Financial

	Current	Retirement
Bank Fees		
Credit Cards		
Charity		
Dues		
	\$ -	

Transportation

	Current	Retirement
Loans		
Insurance		
Gas		
Maintenance		
	\$ -	\$ -

Leisure

	Current	Retirement
Vacation		
Hobbies		
Entertainment		
Subscriptions		
	\$ -	

Insurance

	Current	Retirement
Home		
Life		
Disability		
Medical		
	\$ -	\$ -

Day-to-Day

	Current	Retirement
Restaurants		
Clothing		
Food		
	\$ -	

Utilities

	Current	Retirement
DSL		
Trash/Water sewer		
Cable		
Telephone		
Electric		
	\$ -	\$ -

Notes
