

Financial Planning

Expense Worksheet

RETIREMENT CLARITY COMMUNITY

retirementclaritycommunity.com

Name: _____ Date: _____

Housing	Monthly	Annual
Mortgage		
Condo Fees/Association Fee		
Electricity/Gas		
Water		
Garbage Removal		
Telephone/Personal Computer		
Cable/Satellite TV/Internet		
Security System		
Pool Service		
Lawn Service		
Maid Service		
Maintenance/Improvements		
Property Taxes		
Pest/Bug Service		
Home Owners Insurance/Other		
TOTAL		

Child Care	Monthly	Annual
Support Payments		
Daycare/Education		
Sports/Activities		
Other		
TOTAL		

Groceries	Monthly	Annual
Food/Beverages		
Household Supplies		
Other		
TOTAL		

Clothing	Monthly	Annual
Adult #1		
Adult #2		
Children		
TOTAL		

Furnishings	Monthly	Annual
Inside/Outside		
TOTAL		

Personal Care and Cash	Monthly	Annual
Dry Cleaning		
Hair/Nails/Facials		
Cosmetics/Shoe Shine		
Massage		
Health Club		
Other		
TOTAL		

Medical/Dental/Vision	Monthly	Annual
Co-Pays/Deductibles		
Prescriptions/Health Care Cost		
Vitamins		
Other		
TOTAL		

Education/Self Improvement	Monthly	Annual
Private School/College		
Classes/Books/Paper		
Fees/Subscriptions		
Hobbies/Other		
TOTAL		

Transportation	Monthly	Annual
Loan/Lease Payment #1		
Loan/Lease Payment #2		
Loan/Lease Payment #3		
Gasoline		
Maintenance/Improvements		
Registration/Excise Tax		
Auto Insurance		
Other		
TOTAL		

Entertainment	Monthly	Annual
Dining Out		
Sports Tickets		
Theater Tickets		
Recreation/Hobbies		
Movies/Videos		
Club Membership Fees		
Other		
TOTAL		

Vacations and Holiday	Monthly	Annual
Travel Tickets		
Hotels		
Food		
Entertainment		
Auto		
Other		
TOTAL		

Charitable Contributions	Monthly	Annual
Favorite Charity		
Cash Donations		
Other		
TOTAL		

MONTHLY TOTAL	
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ANNUAL TOTAL	
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Installment Debt Payments	Monthly	Annual
Student Loans		
Credit Cards		
Other		
TOTAL		

Professional Services	Monthly	Annual
Financial Planner		
Accountant		
Attorney		
TOTAL		

Gifts	Monthly	Annual
Holidays		
Birthdays		
Weddings		
Other		
TOTAL		

Pets	Monthly	Annual
Food		
Veterinarian		
Pet Insurance/Other		
TOTAL		

Miscellaneous	Monthly	Annual
Support/Alimony		
TOTAL		