

# FINANCIAL SERVICE PARTNERS

*for a better tomorrow...partner with us today*

900 Jefferson Road, Suite 301

Rochester, NY 14623

585-697-2958

financialservicepartners.com

## HOUSEHOLD EXPENSES/BUDGET WORKSHEET

Expense	Budget Amount	Frequency (M/Q/A)	Annual Total
<b>HOME</b>			
Mortgage or Rent			
Homeowners/Renters Insurance			
Property Taxes			
Home Repairs/Maintenance			
Home Improvements			
<b>UTILITIES</b>			
Electricity			
Water and Sewer			
Natural Gas or Oil			
Telephone (Land Line, Cell)			
<b>FOOD</b>			
Groceries			
Eating Out, Lunches, Snacks			
<b>FAMILY OBLIGATIONS</b>			
Child Support/Alimony			
Day Care, Babysitting			
<b>HEALTH AND MEDICAL</b>			
Life Insurance (term, whole life, etc.)			
Long Term Care			
Disability Insurance			
Insurance (medical, dental, etc.)			
Out-of-Pocket Medical Exp.			
Fitness (Yoga, Massage, Gym)			
<b>DEBT PAYMENTS</b>			
Credit Cards			
Student Loans			
Other Loans			

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Expense	Budget Amount	Frequency (M/Q/A)	Annual Total
<b>TRANSPORTATION</b>			
Car Payments			
Gasoline/Oil			
Auto Repairs/Maintenance/Fees			
Auto Insurance			
Other (tolls, bus, taxi)			
<b>ENTERTAINMENT/RECREATION</b>			
Cable TV/Videos/Movies			
Internet			
Hobbies			
Subscriptions and Dues			
Vacations			
<b>PETS</b>			
Food			
Grooming, Boarding, Vet			
<b>MISCELLANEOUS</b>			
Toiletries, Household products			
Gifts/Donations			
Grooming (Hair, Make-up, Other)			
<b>TOTAL ANNUAL EXPENSES</b>	\$	\$	\$
<b>MONTHLY INCOME</b>		<b>ANNUAL INCOME</b>	
W2 Income #1			
W2 Income #2			
Social Security #1			
Social Security #2			
Pension #1			
Pension #2			
Rental Income			
Rental Income			
<i>Total Income Monthly</i>		<i>Total Income Annual</i>	