

Income	Single	Joint
Wages, Salary, and tips	\$	\$
Business income/loss	\$	\$
Investment income (Dividends, interests, IRA distributions)	\$	\$
Subtotal	\$	\$

Living Expenses		
General	\$	\$
Rent	\$	\$
Homeowner rental insurance	\$	\$
Health Insurance	\$	\$
Auto Insurance	\$	\$
Property Taxes	\$	\$
Home Repairs/Maintenance	\$	\$
Utilities	\$	\$
Groceries	\$	\$
Personal Goods (Toiletries, Dry Cleaning, Housekeeping)	\$	\$
Entertainment (Dining out, Travel, Vacation)	\$	\$
Clothing	\$	\$
Transportation	\$	\$
Charitable contributions	\$	\$
Other	\$	\$
Subtotal	\$	\$

Debts	Responsible Party	Balance	Monthly Payment	Interest Rate	Lending Institution
Primary Residence		\$	\$		
Student Loans		\$	\$		
Credit Card					
Credit Card		\$	\$		
Credit Card					
Other		\$	\$		
Subtotal		\$	\$		

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Life Insurance	Insurer Name	Owner	Beneficiary	Cash Value	Annual Premium
Term				\$	\$
Group Work				\$	\$
Other				\$	
Subtotal				\$	\$

Current Finaical Commitments (Monthy) or Annually		
	Single	Joint
Retirement Plan Balance (401K)		
Personal Contribution	\$	\$
Employers Contribution	\$	\$
Retirement Contribution	\$	\$
Investments	\$	\$
Other	\$	\$

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