

LIFESTYLE ANALYSIS BUDGET WORKSHEET

INVESTMENTS, CHECKING ACCOUNTS, ETC

Description	Monthly	Annual
Rent / Mortgage		
Homeowners/Association Fees		
Property Taxes		
Telephone		
Cellphone		
Internet		
Security System		
Cable/Satellite		
Electricity		
Gas/Fuel Oil/Propane/Wood		
Water/Sewer		
Trash Removal		
Grass Cutting/Fertilizing		
Landscape Maintenance		
Snow Removal		
Exterminator		
Gen Home Repairs/Maint./Windows/Carpets		
Home Improvements/Upgrades		
Housecleaning		
Miscellaneous Household		
TOTAL HOME EXPENSES		

FOOD EXPENSES

Description	Monthly	Annual
Groceries		
Snacks		
Fast Foods		
Restaurant Meals		
TOTAL FOOD EXPENSES		

ENTERTAINMENT EXPENSES

Description	Monthly	Annual
Entertainment (Excludes Dining Out)		
Videos/CDs/DVDs		
Movies and Theater		
Classes/Lessons (Recreational) for Self		
Vacations/Travel		
Memberships/Clubs for Self		
TOTAL ENTERTAINMENT EXPENSES		

MEDICAL EXPENSES (After Insurance – Excludes Children)

Description	Monthly	Annual
Physicians		
Dentist/Orthodontist		
Optometrist/Glasses/Contacts		
Prescriptions		
TOTAL MEDICAL EXPENSES		

INSURANCE EXPENSES

Description	Monthly	Annual
Life		
Health & Dental (Post Divorce)		
Disability		
Long Term Care		
Home Insurance		
Auto Insurance		
Other (RV, Boat, Umbrella, etc)		
TOTAL INSURANCE EXPENSES		

PERSONAL TRANSPORTATION EXPENSES

Description	Monthly	Annual
Auto Payment		
Fuel		
Repair/Maintenance/Car Wash		
Parking/Tolls		
License/Registration		
Taxis/Public Transit		
TOTAL PERSONAL TRANSPORTATION EXPENSES		

YOUR CLOTHING EXPENSES

Description	Monthly	Annual
Clothing		
Laundry/Dry Cleaning		
TOTAL CLOTHING EXPENSES		

MISCELLANEOUS EXPENSES

Description	Monthly	Annual
Gifts/Holiday Expenses		
Vitamins/OTC Drugs		
Toiletries		
Beauty Salon/Hair/Nails		
Pet Care/Vet		
Books/Newspapers/Magazines		
Stationary/Home Office Supplies		
Postage/Courier		
Business Expenses (Non-Reimbursed)		
Education: Self (Non-Reimbursed)		
Bed, Bath, Kitchen, etc.		
Floral Arrangements		
Photo Developing/Printing		
Contributions/Donations		
Cash		
Other Miscellaneous		
TOTAL MISCELLANEOUS EXPENSES		

OTHER PAYMENTS

Description	Monthly	Annual
Quarterly Taxes		
Other Tax Payments		
Credit Card Payments		
Loan/Debt Payments		
Service Fees (Banks, Investment Accts, etc.)		
Elderly Care Expenses		
Spousal Support Payments		
Child Support Payments		
Professional Fees (Financial Planning, Acct, Legal)		
Mediation/Arbitration/Court Costs		
Therapy/Counseling		
TOTAL OTHER PAYMENTS		

TOTAL EXPENSES (Excluding Children)	Monthly	Annual
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CHILD-RELATED EXPENSES

Description	Monthly	Annual
Education/Tuition		
School Supplies/Field Trips/Expenses		
Childcare: Work Related (After Tax Credit)		
Childcare: Non-Work Related		
Sports/Camps/Lessons		
Hobbies/Toys/Games		
School Meals/Luncheons		
Clothing		
Medical*		
Dentist/Orthodontist*		
Optometrist/Glasses/Contacts*		
Prescription*		
Allowances		
Transportation		
Miscellaneous		
TOTAL CHILD-RELATED EXPENSES		

TOTAL EXPENSES (Including Children)	Monthly	Annual
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*Expenses Not Covered by Insurance