

Financial Overview For			Revised as of -	
	Monthly	Annually	Monthly	Annually
Savings			Expenses Continued	
Personal Savings			Entertainment	
Personal Investments			Dining Out	
CDs/Mutual Funds/etc - His			Sports Tickets	
CDs/Mutual Funds/etc - Hers			Theater Tickets	
Retirement Investments -			Golf, etc.	
IRA/401k/403b - His			Other (Magazines)	
IRA/401k/403b - Hers			Miscellaneous	
Education Investments - 529			Family Support	
Total Savings			Alimony	
Expenses			Personal Computer	
Housing			Hobbies	
Mortgage/Rent			Other	
Vacation Home			Vacations & Holidays	
Investment Property			Travel Tickets	
Real Estate Taxes			Hotels/Food	
Electric/Gas Utilities			Charitable Contributions	
Water			House of Worship	
Telephone/Cell			Other	
Cable TV			Gifts	
Internet			Holidays	
Security System			Birthdays/Weddings	
Pool Service			Pets	
Lawn Service			Food	
Maintenance/Pest Control			Veterinarian	
Household Help			Installment Debt Payments	
Other			Credit Cards	
Child Care			Student Loans	
Daycare			Other	
Sports Activities				
Child Support			General Insurance	
Other			Homeowners Ins.	
Transportation			Other	
Auto Loan/Lease			Life Insurance	
Gas/Maintenance			Policy 1 - His	
Tags/Inspection			Policy 2 - Hers	
Taxi/Bus/Train			Medical Insurance	
Other			Policy 1 - His	
Education/Self Improvement			Policy 2 - Hers	
Tuition (Private School/College)			Auto Insurance	
Classes			Policy 1 - His	
Hobbies			Policy 2 - Hers	
Association Fees			Disability Insurance	
Other			Policy 1 - His	
Food/Beverages			Policy 2 - Hers	
Groceries			Long-Term Care	
Household Supplies			Policy 1 - His	
Wine/Beer/etc			Policy 2 - Hers	
Other				
Clothing			Total Expenses	\$0.00
Husband				\$0.00
Wife			Sources of Income	
Children			Earned Income	
Personal Care and Cash			Bonus Income	
Dry Cleaning			Royalties/Rental Income	
Hair/Nails/Facials			Investment Income	
Cosmetics			Social Security	
Health Club Dues			Pension Income	
Medical/Dental/Prescriptions			Child Support	
Doctors				
Dentists			Total Income	\$0.00
Eyeglasses				\$0.00
Drugs				
Other			Adjusted Total Expenses	
Subtotal of Expenses	\$0.00	\$0.00	Net Disposable Income	\$0.00

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