Financial Planning
Expense Worksheet

MetLife

Name: _____ Date: _____

HOUSING	Monthly	Annual	CLOTHING	Monthly	Annual
Mortgage			Adult #1		
Condo Fees / Association Fee			Adult #2		
Electricity / Gas			Children		
Water			**TOTAL**		
Garbage Removal			**FURNISHINGS**		
Telephone / Personal Computer			Inside / Outside		
Cable / Satellite TV / Internet			**TOTAL**		
Security System			**PERSONAL CARE AND CASH**		
Pool Service			Dry Cleaning		
Lawn Service			Hair / Nails / Facials		
Maid Service			Cosmetics / Shoe Shine		
Maintenance / Improvements			Massage		
Property Taxes			Health Club		
Pest / Bug Service			Other		
Home Owners Insurance / Other			**TOTAL**		
TOTAL			**MEDICAL / DENTAL / VISION**		
CHILD CARE			Co-Pays / Deductibles		
Support Payments			Prescriptions / Health Care Costs		
Daycare / Education			Vitamins		
Sports Activities			Other		
Other			**TOTAL**		
TOTAL			**EDUCATION / SELF IMPROVEMENT**		
TRANSPORTATION			Private School / College		
Loan / Lease Payment #1			Classes / Books / Paper		
Loan / Lease Payment #2			Association Fees / Subscriptions		
Loan / Lease Payment #3			Hobbies / Other		
Gasoline			**TOTAL**		
Maintenance / Improvements			**INSTALLMENT DEBT PAYMENTS**		
Registration / Inspection / Excise tax			Student Loans		
Auto Insurance			Credit Cards		
TOTAL			Other		
GROCERIES			**TOTAL**		
Food / Beverages			**PROFESSIONAL SERVICES**		
Household Supplies			Financial Planner		
Other			Accountant		
			Attorney		
TOTAL			**TOTAL**		

	Monthly	Annual
ENTERTAINMENT		
Dining Out		
Sports Tickets		
Theater Tickets		
Recreation / Hobbies		
Movies / Videos		
Club Membership Fees		
Other		
TOTAL		
VACATIONS AND HOLIDAY		
Travel Tickets		
Hotels		
Food		
Entertainment		
Auto		
Other		
TOTAL		
CHARITABLE CONTRIBUTIONS		
Favorite Charity		
Cash Donations		
Other		
TOTAL		

	Monthly	Annual
GIFTS		
Holidays		
Birthdays		
Weddings		
Other		
TOTAL		
PETS		
Food		
Veterinarian		
Pet Insurance / Other		
TOTAL		
MISCELLANEOUS		
Support / Alimony		
TOTAL		

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