

Budget Data Gathering

Personal and Confidential

Financial Advisor: _____ Date:____

Budget

Personal and Family Expenses

Alimony Bank Charges Books/Magazine Business Expense Care for Parent/Other Cash - Miscellaneous Cell Phone Charitable Donations Child Activities Child Allowance/Expense Child Support Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Prescription Healthcare - Prescription Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Student Loan Payment Vacation/Travel	Monthly Budget A		dget Amount
Alimony Bank Charges Books/Magazine Business Expense Care for Parent/Other Cash - Miscellaneous Cell Phone Charitable Donations Child Activities Child Allowance/Expense Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Category	Current	-
Bank Charges Books/Magazine Business Expense Care for Parent/Other Cash - Miscellaneous Cell Phone Charitable Donations Child Activities Child Allowance/Expense Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Alimony		Ketirement
Books/Magazine Business Expense Care for Parent/Other Cash - Miscellaneous Cell Phone Charitable Donations Child Activities Child Allowance/Expense Child Support Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Business Expense Care for Parent/Other Cash - Miscellaneous Cell Phone Charitable Donations Child Activities Child Allowance/Expense Child Support Child Tutor Clothing - Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Student Loan Payment Vacation/Travel			
Care for Parent/Other Cash - Miscellaneous Cell Phone Charitable Donations Child Activities Child Allowance/Expense Child Care Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Cash - Miscellaneous Cell Phone Charitable Donations Child Activities Child Allowance/Expense Child Care Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	·		
Cell Phone Charitable Donations Child Activities Child Allowance/Expense Child Care Child Support Child Tutor Clothing - Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	·		
Charitable Donations Child Activities Child Allowance/Expense Child Care Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Per Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Child Activities Child Allowance/Expense Child Care Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Per Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Child Allowance/Expense Child Care Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Per Sonal Care Per Sonal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Child Care Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Child Support Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Child Tutor Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Clothing - Client Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Self Improvement Student Loan Payment Vacation/Travel			
Clothing - Co-Client Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Self Improvement Student Loan Payment Vacation/Travel			
Clothing - Children Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Club Dues Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Self Improvement Student Loan Payment Vacation/Travel			
Credit Card Debt Payment Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel			
Dining Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Club Dues		
Education Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Credit Card Debt Payment		
Entertainment Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Dining		
Gifts Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Education		
Groceries Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Entertainment		
Healthcare - Dental Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Gifts		
Healthcare - Medical Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Groceries		
Healthcare - Prescription Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Healthcare - Dental		
Healthcare - Vision Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Healthcare - Medical		
Hobbies Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Healthcare - Prescription		
Household Items Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Healthcare - Vision		
Laundry/Dry Cleaning Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Hobbies		
Personal Care Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Household Items		
Personal Loan Payment Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Laundry/Dry Cleaning		
Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Personal Care		
Pet Care Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	Personal Loan Payment		
Public Transportation Recreation Self Improvement Student Loan Payment Vacation/Travel	-		
Recreation Self Improvement Student Loan Payment Vacation/Travel	Public Transportation		
Student Loan Payment Vacation/Travel	·		
Student Loan Payment Vacation/Travel	Self Improvement		
Vacation/Travel			
Uner	Other		

Personal Insurance Expenses

	Monthly Budget Amount	
Category	Current	Alt 1 / Retirement
Disability for Client		
Disability for Co-Client		
Life for Client		
Life for Co-Client		
LTC for Client		
LTC for Co-Client		
Medical for Client		
Medical for Co-Client		
Umbrella Liability		
Other		

Taxes

	Monthly Budget Amount	
Category	Current	Alt 1 /
	ı	Retirement
Client FICA		
Client Medicare		
Co-Client FICA		
Co-Client Medicare		
Federal Income		
State Income		
Local Income		
Other		

<u>Income</u>

	Monthly Budget Amount	
Category	Current	Alt 1 /
	Current	Retirement
Employment		
Other		

Budget

Home Expenses

Description:		
Describtion:		

	Monthly Budget Amount		
Category	Current	Alt 1 / Retirement	
First Mortgage			
Second Mortgage			
Equity Line			
Real Estate Tax			
Rent			
Homeowner's Insurance			
Association Fees			
Electricity			
Gas/Oil			
Trash Pickup			
Water/Sewer			
Cable/Satellite TV			
Internet			
Telephone (land line)			
Lawn Care			
Maintenance - Major Repair			
Maintenance - Regular			
Furniture			
Household Help			
Other			

Vehicle Expenses

Description:		

	Monthly Budget Amount	
Category	Current	Alt 1 / Retirement
Loan Payment		
Lease Payment		
Insurance		
Personal Property Tax		
Fuel		
Repairs/Maintenance		
Parking/Tolls		
Docking/Storage		
Other		

Vehicle Expenses

Description:		

	Monthly Budget Amount	
Category	Current	Alt 1 / Retirement
Loan Payment		
Lease Payment		
Insurance		
Personal Property Tax		
Fuel		
Repairs/Maintenance		
Parking/Tolls		
Docking/Storage		
Other		