

# Living Expense Summary

## DESIGNATED EXPENSES

## Annual Cost

<i><b>Liabilities</b></i>	Original Amt	Interest Rate	
Mortgage (primary)			-
Home Equity Line of Credit			-
Car Loans			-
Student Loans			-
			\$ -
<i><b>Insurance</b></i>	Benefit	Term Period	
Life Ins Premiums- Self			-
Life Ins Premiums- Others			-
Disability Insurance			-
Other (i.e. long term care)			-
			\$ -
<i><b>Education</b></i>	Child	Years	
Qualified Savings Plan			-
Private School			-
College Expenses			-
			\$ -
<b>Subtotal Designated Expenses</b>			<b>\$ -</b>

## GENERAL EXPENSES

## Annual Cost

<i><b>Medical Insurance</b></i>	
Medical Insurance Premiums	-
Medical Savings Account (FSA/HSA)	-
Out of Pocket (Medical/Dental/Drugs)	-
	\$ -
<i><b>Property Taxes</b></i>	
Property Taxes (deductible)	\$ -
<i><b>Charitable Giving</b></i>	
Charities	\$ -
<i><b>Other Pre-tax Expenses</b></i>	
Transit/Commuter	\$ -
<b>Subtotal Pre Tax Expenses</b>	
	<b>\$ -</b>

### ***Other Home Expenses***

Rent Expense	-
Association Dues	-
Home Insurance	-
Maintenance/Repairs	-
Furnishings (annual expenses only)	-
Cleaning Service/Other	-
	\$ -

### ***Utilities***

Electricity/Gas/Water/Sanitation	-
Telephone/Cable/Internet	-
Other	-
	\$ -

### ***Food/Household***

Groceries	-
Household Items	-
<b>\$</b>	<b>-</b>

**Clothing**

Self	-
Others	-
<b>\$</b>	<b>-</b>

**Transportation**

Gas/Oil	-
Insurance	-
License/Tax	-
Maintenance/Repair	-
Parking & Tolls	-
Other	-
<b>\$</b>	<b>-</b>

**Entertainment and Recreation**

Eating Out	-
Trips/Vacation (annually recurring)	-
Memberships/Subscriptions	-
Books/Movies/CDs	-
Parties	-
<b>\$</b>	<b>-</b>

**Children**

Clothing	-
Allowances	-
Activities/Lessons	-
Babysitters	-
<b>\$</b>	<b>-</b>

**Gifts (Non-deductible)**

Birthday	-
Christmas	-
Other	-
<b>\$</b>	<b>-</b>

**Miscellaneous**

Beauty/Barber	-
Laundry/Drycleaning	-
Total Cash Allowance	-
Pets	-
Professional Fees	-
Other (specify)	-
<b>\$</b>	<b>-</b>

<b>Subtotal Living Expenses</b>	<b>\$ -</b>
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<b>AMOUNT USED IN ANALYSIS:</b>	<b>\$ -</b>
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<b>SUBTOTAL GENERAL EXPENSES</b>	<b>\$ -</b>
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<b>GRAND TOTAL OF EXPENSES</b>	<b>\$ -</b>
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**ONE-TIME EXPENSES**                      **Year(s)**              **Cost**                      **How often (once, eve**  
TFC Financial Plan  
Home Project(s)

Car Purchases

Vacation/Trip

Other:

























































































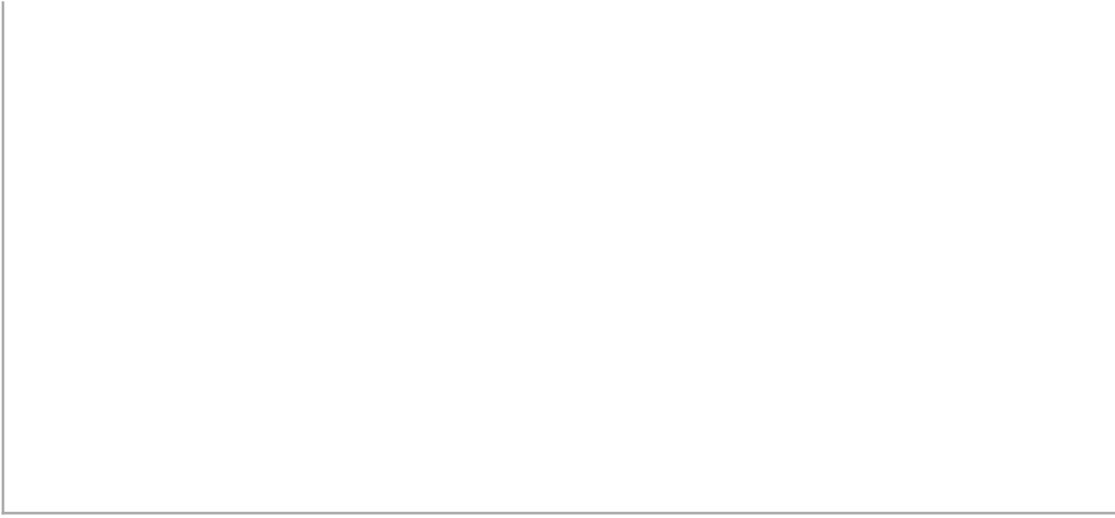














**Notes**

*monthly payments annualized*

*annual contribution amount  
actual annual cost  
actual annual cost*

**Notes**

*actual or escrow amount*



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