

Name: _____

Date: _____

	Monthly	Annual		Monthly	Annual
Auto and Transport			Health and Fitness		
Auto Insurance			Dentist - Co-pays / Deductibles		
Gas and Fuel			Doctor - Co-pays / Deductibles		
Loan / Lease Payments			Eye care - Co-pays / Deductibles		
Parking and Tolls			Vitamins		
Registration / Inspection			Gym and Sports		
Service and Parts			Pharmacy - Out of pocket		
Other			Other		
Business Expenses Not Reimbursed			Gifts and Donations		
Meals / Entertainment			Charity		
Subscriptions			Cash Donations		
Continuing Education			Other		
Professional Association Dues			Gifts		
Other			Holidays		
Education			Birthdays		
Books and Supplies			Weddings		
Private School			Other		
Room and Board			Groceries		
Classes / Tuition			Food / Beverages		
Entertainment			Household Supplies		
Sports Tickets			Other		
Recreation / Hobbies			Insurance		
Movies and DVDs			Disability Insurance		
Newspaper and Magazines			Health Insurance		
Dining Out			Dental Insurance		
Club Membership Fees			Vision Insurance		
Coffee			Life Insurance		
Theater Tickets			Long-Term Care Insurance		
Other			Liability (Umbrella) Insurance		
Housing			Other		
Furnishings			Children		
Home Owner's Association Dues			Allowance		
Home Improvement / Maintenance			Support Payments		
Homeowner's Insurance			Babysitter and Daycare		
Electricity / Gas			Children's Activities		
Home Phone / Cell Phone			Toys		
Internet / TV / Cable			Other		
Waste Management			Loans/Credit Cards/Finance Charges		
Water			Credit Card Payments		
Security System			Student Loan Payment		
Mortgage Payment			Other		
Second Mortgage Payment			Personal Care		
Property Taxes			Hair / Nails / Facials		
Pest / Bug Service			Laundry / Dry Cleaning		
Cleaning Service			Health Club		
Pool Service			Cosmetics		
Lawn and Garden			Spa and Massage		
Other			Other		
Pets			Travel		
Pet Food and Supplies			Airline Tickets		
Pet Insurance			Hotels		
Pet Grooming			Food / Beverages		
Veterinarian			Rental Car and Taxi		
Other			Entertainment Others		
Shopping			Other		
Books			Professional and Legal Fees		
Clothing - Adults and Children			Accountant		
Electronics and Software			Attorney		
Home Appliances and Décor			Financial / Investment Advisor		
Other			Other		
Other					
Support / Alimony Payments					
Other					
			\$	-	\$

Name: _____

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	Name	Company	Business Phone	Email	Address	Website	Authorization
Certified Financial Planner	Julie Bray	GW Financial, Inc.	(714) 850-0534	julie@planretire.com	151 Kalmus Drive, C-150 Costa Mesa, CA 92626	www.planretire.com	Y
Attorney							
Accountant/CPA							
Trust Officer							
Employer Benefits Advisor							
Banker							
Other							
Children							