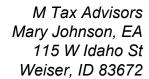


M Tax Advisors Mary Johnson, EA 115 W Idaho St Weiser, ID 83672

## **Monthly Living Expenses Worksheet**

Client:	Date:
Housing	Support / Contributions
Mortgage	* Alimony
Rent	* Charity
Homeowner's Insurance	* Child Support
· Condo Fees/HOA	* Church
Mello-Roos	Credit Card debt
RE/Property Taxes	* Doctor/Dentist
Bottled Water	* Medicines
· Cable/satellite	Other installment
Furnishings	Political
* Home Alarm	Total
Home Repairs	<del></del>
Housekeeping	
Improvements	Auto / Transportation
Other	* Auto - Fuel
Pest Control	* Auto Club
Pet Care	* Auto Insurance
Pool Maintenance	* DMV Fees - Reg/Taxes
Second home	* Lease Payments
* Utilities - Electricity	* Loan Payment
* Utilities - Gas	* Repair/Tune ups
* Utilities - Internet Svc.	* Wash/Parking
* Utilities - Telephone	<u>Total</u>
* Utilities - Water/Sewer	
Yard Maintenance	
* Property Tax - Aircraft	<u>Children</u>
* Property Tax - Boat	Allowance
Property Tax - Misc	* Babysitter
<u>Total</u>	* Camp
	* Child Care
	Clothing
<u>Food</u>	* Education
* Groceries	* Health Insurance
Liquor	Lessons/Music
Dining Out	Sports
<u>Total</u>	<u>Total</u>





Client:	
<u>Personal</u>	Savings/Insurance
ATM	Regular Savings
Accountant Fees	Cash Reserve
Attorney Fees	* 401(k)
Barber/Beauty	* Traditional IRA
Cell Phone	Roth IRA
Cleaners/Laundry	* SEP / SIMPLE
Clothing	* TSA / TDA
Education	* Defined Benefit Plan
Financial Advisor	Other savings
Gifts ———	Client A life insurance
Personal Care	Client B life insurance
Pocket money	Other life insurance
Professional Dues	Client A dis. insurance
Safety Deposit Box	Client B dis. insurance
Student Loan	Client A LTC insurance
Toiletries	Client B LTC insurance
Total \$	- * Client A health insurance
	* Client B health insurance
	Client A vision insurance
<u>Entertainment</u>	Insurance - Liability/Umbrella
Clubs	* Client B vision insurance
Country Club	* dental insurance
* Entertainment	other insurance
Hobbies	<u>Total</u>
Lessons	
Subscriptions	Monthly totals
Recreation	
Self Improvement	Annual totals
Sporting Events	
Theaters	Auto Loan Balance:
Vacation	Auto Loan Balance:
VCR/Music	Student Loan Balance:
<u>Total</u>	Student Loan Balance:
	Credit Card Balances:
	Credit Card Balances: