

# CLIENT WORKSHEET

## AVERAGE MONTHLY/YEARLY EXPENSES

CLIENT \_\_\_\_\_ DATE \_\_\_\_\_

Monthly or Annual

**FOOD:**

Groceries/Personal Items bought at grocery store \_\_\_\_\_

**HOUSING:**

Rent/Condo Fees (not mortgage pmts.)/Heating/Electricity  
 Water/Sewer/Trash/Phone/Cable TV/Repairs/Lawn Service  
 Regular Maintenance/Furnishings/Decorating/Snow plowing  
 Landscaping/Major appliances/Home improvement \_\_\_\_\_

**TRANSPORTATION:**

Repairs/Maintenance/Gasoline/Oil/Licenses/Bus/Taxi  
 Air Fares/Parking/Tolls \_\_\_\_\_

**CLOTHING:**

New Clothing/Alterations/Laundry/Dry Cleaning \_\_\_\_\_

**PERSONAL CARE:**

Barber/Hairdresser/Cosmetics \_\_\_\_\_

**MEDICAL:**

Dental/Optomety/Orthodontia/Medical Not Covered by Ins. \_\_\_\_\_

**HOUSEHOLD HELP and PETS:**

Domestic Help/Child Care  
 Vet/Kennel/Misc. Expenses \_\_\_\_\_

**SCHOOL EXPENSES:**

Preschool/Tuition/Lessons/Music/Sports/Clubs  
 Continuing Education Courses \_\_\_\_\_

**ENTERTAINMENT and GIFTS:**

Tickets/Sporting Events/Restaurants/Club dues/Movies/Magazines  
 Newspapers/Hobbies/Vacations/Tobacco/Alcohol/Music/Books/Computers  
 Christmas/Weddings/Graduation/Birthdays/Alumni/Boosters  
 (Do not include tax-deductible contr.) \_\_\_\_\_

**Amount Set Aside for Savings and Investments** \_\_\_\_\_