

Your Monthly Expense Worksheet

First Name

Last Name

Client 1

Client 2

Essential Expenses

<u>Description</u>	<u>Current</u>	<u>Revised</u>
Housing		
Mortgage/rent		
Utilities (heat, hydro, etc)		
Phone/Cell/Internet/Cable		
Insurance (home)		
Property Tax		
Condominium Fees		
Maintenance		
Other:		
Total Housing		
Transportation		
Gas/Fuel		
Car Loan or Lease Payment		
Car Insurance		
Maintenance and Repairs		
Parking		
Public Transit		
Other:		
Total Transportation		
Daily Living		
Groceries		
Clothing		
Other:		
Total Daily Living		
Healthcare Expenses		
Eye/Dental		
Assisted Living Care & Nursing		
Prescription		
Other:		
Total Healthcare Expenses		

<u>Description</u>	<u>Current</u>	<u>Revised</u>
Financial Obligations		
Registered Contributions (RRSP)		
RESP Contributions		
TFSA Contributions		
Non-registered Contributions		
Pension Contributions		
Loan Payments		
Credit Card Payments		
Health Insurance Premiums		
Life Insurance Premiums		
Disability Insurance Premiums		
Critical Illness Insurance Premiums		
Long Term Care Insurance Premiums		
Monthly Bank Fees		
Other:		
Total Financial Obligations		
Discretionary Expenses		
Recreation & Leisure		
Fitness		
Travel/Vacation		
Hobbies		
Pets		
Entertainment		
Restaurants/Meals		
Subscriptions		
Other:		
Total Recreation & Leisure		
Miscellaneous		
Gifts		
Charities		
Other:		
Total Miscellaneous		
Total Expenses:		