



(1) HOME

TOTAL HOME MONTHLY COST \$ \_\_\_\_\_

Service	Apply?	Need (N) Want (W) Depends (D)	Details	Your Monthly Cost
Rent/Mortgage	<input type="checkbox"/>			
Utilities	<input type="checkbox"/>		electric, gas, trash	
Property Tax	<input type="checkbox"/>			
HOA Fees	<input type="checkbox"/>			
Internet	<input type="checkbox"/>			
Gardener	<input type="checkbox"/>			
Pest Service	<input type="checkbox"/>			
Plumbing	<input type="checkbox"/>			
Cell Phone Service	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			

Thing	Apply?	Need (N) Want (W) Depends (D)	Details	Suggested Useful Life	Suggested Cost	Suggested Monthly Cost	Your Monthly Cost
A/C unit	<input type="checkbox"/>		replace A/C unit	10 years	\$10,000	\$83	
Electrical	<input type="checkbox"/>		lights, repair, replacement	5 years	\$2,000	\$33	
Garden equipment	<input type="checkbox"/>		mower, trimmer, tools, etc.	5 years	\$500	\$8	
Heater	<input type="checkbox"/>		replace Heating unit	10 years	\$10,000	\$83	
Home Supplies	<input type="checkbox"/>		toilet paper, paper towels, soap, sponges	2 months	\$30	\$15	
Kitchen equipment	<input type="checkbox"/>		blender, mixer, toaster, grill	5 years	\$500	\$8	
Roof	<input type="checkbox"/>		replace roof	12 years	\$10,000	\$69	
Refrigerator	<input type="checkbox"/>		replace refrigerator	7 years	\$1,100	\$13	
Stove	<input type="checkbox"/>		upgrade/replace	10 years	\$700	\$6	
Home Décor	<input type="checkbox"/>		pillows/wall art/seasonal décor	monthly	\$100	\$100	
Mattress	<input type="checkbox"/>		replace mattress	5 years	\$800	\$13	
Furniture	<input type="checkbox"/>		coach, bed, chair, tables	10 years	\$6,000	\$50	
<b>TOTAL</b>						<b>\$483</b>	





## [3] INSURANCE

TOTAL INSURANCE  
MONTHLY COST

\$ \_\_\_\_\_

Service	Apply?	Need (N) Want (W) Depends (D)	Details	Your Monthly Cost
Car Insurance	<input type="checkbox"/>			
Health Insurance	<input type="checkbox"/>			
Homeowners Ins.	<input type="checkbox"/>			
Renters Insurance	<input type="checkbox"/>			
Disability Insurance	<input type="checkbox"/>			
Earthquake Insurance	<input type="checkbox"/>			
Identity Theft Ins.	<input type="checkbox"/>			
Long-term Care Ins.	<input type="checkbox"/>			
Umbrella Insurance	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			



## [4] FOOD & DINING

Service	Apply?	Need (N) Want (W) Depends (D)	Details	Your Monthly Cost
Groceries	<input type="checkbox"/>			
Eating Out	<input type="checkbox"/>			
Food delivery	<input type="checkbox"/>			
Coffee	<input type="checkbox"/>			
Drinks	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			

TOTAL FOOD  
MONTHLY COST

\$ \_\_\_\_\_



## (5) PERSONAL CARE

TOTAL PERSONAL CARE MONTHLY COST \$ \_\_\_\_\_

Service	Apply?	Need (N) Want (W) Depends (D)	Details	Your Monthly Cost
Home clothes	<input type="checkbox"/>			
Work clothes	<input type="checkbox"/>			
Shoes	<input type="checkbox"/>			
Make-up	<input type="checkbox"/>			
Hair	<input type="checkbox"/>			
Dry cleaning	<input type="checkbox"/>			
Laundry Supplies	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			



## (6) KIDS & PETS

Service	Apply?	Need (N) Want (W) Depends (D)	Details	Your Monthly Cost
Allowance	<input type="checkbox"/>			
Kid activities	<input type="checkbox"/>			
Kid supplies	<input type="checkbox"/>			
Kid clothing	<input type="checkbox"/>			
Babysitter	<input type="checkbox"/>			
Daycare	<input type="checkbox"/>			
Toys	<input type="checkbox"/>			
Pet supplies	<input type="checkbox"/>			
Pet care/health	<input type="checkbox"/>			
Kid schooling	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			

TOTAL KID/PET MONTHLY COST \$ \_\_\_\_\_



# (7) HEALTH & FITNESS

TOTAL HEALTH & FITNESS  
MONTHLY COST

\$ \_\_\_\_\_

Service	Apply?	Need (N) Want (W) Depends (D)	Details	Your Monthly Cost
Pharmacy	<input type="checkbox"/>		copays not covered from insurance	
Gym membership	<input type="checkbox"/>			
Eye care	<input type="checkbox"/>		contacts/solution/glasses	
Essential oils	<input type="checkbox"/>			
Sport clubs	<input type="checkbox"/>			
Park passes	<input type="checkbox"/>			
Camping fees	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			

Thing	Apply?	Need (N) Want (W) Depends (D)	Details	Suggested Useful Life	Suggested Cost	Suggested Monthly Cost	Your Monthly Cost
Running shoes	<input type="checkbox"/>		may include insoles	1 year	\$125	\$10	
Running clothes	<input type="checkbox"/>		shorts, hat, shirt, socks	3 years	\$250	\$7	
Sport equipment 1	<input type="checkbox"/>		stationary bike, dirt bike	7 years	\$1,000	\$12	
Sport equipment 2	<input type="checkbox"/>		surfboard, snowboard, ski, skateboard	7 years	\$1,000	\$12	
Pilates/Yoga gear	<input type="checkbox"/>		pants, mat, top	2 years	\$150	\$6	
Hiking gear	<input type="checkbox"/>		poles, boots, tent, backpack, lights	6 years	\$700	\$7	
Race costs	<input type="checkbox"/>		10K, Marathon, Triathlon	1 year	\$200	\$17	
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						
<b>TOTAL</b>						<b>\$71</b>	



# (8) ENTERTAINMENT

TOTAL ENTERTAINMENT  
MONTHLY COST

\$ \_\_\_\_\_

Service	Apply?	Need (N) Want (W) Depends (D)	Details	Your Monthly Cost
Friend activities	<input type="checkbox"/>			
Dates	<input type="checkbox"/>			
Streaming service	<input type="checkbox"/>			
Memberships	<input type="checkbox"/>			
Concerts	<input type="checkbox"/>			
Airline tickets	<input type="checkbox"/>			
Hotel/Airbnb fees	<input type="checkbox"/>			
Other travel costs	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			
	<input type="checkbox"/>			

Thing	Apply?	Need (N) Want (W) Depends (D)	Details	Suggested Useful Life	Suggested Cost	Suggested Monthly Cost	Your Monthly Cost
Television	<input type="checkbox"/>		replace	5 years	\$500	\$8	
Computer	<input type="checkbox"/>		replace	3 years	\$2,000	\$56	
Cell Phone	<input type="checkbox"/>		replace	2 years	\$700	\$29	
Kindle	<input type="checkbox"/>		replace	3 years	\$125	\$3	
Headphones	<input type="checkbox"/>		Airpods/Noise cancelling	4 years	\$150	\$3	
Watch	<input type="checkbox"/>		Apple watch/traditional	3 years	\$450	\$13	
iPad/tablet	<input type="checkbox"/>		replace	4 years	\$250	\$5	
Music	<input type="checkbox"/>		1 album every other month	2 months	\$15	\$8	
Video games	<input type="checkbox"/>		1 game every 6 months	6 months	\$50	\$8	
Video game system	<input type="checkbox"/>		1 system every other year	2 years	\$300	\$13	
	<input type="checkbox"/>						
	<input type="checkbox"/>						
<b>TOTAL</b>						<b>\$146</b>	



(9) OTHER

TOTAL OTHER  
MONTHLY COST

\$ \_\_\_\_\_



Service	Apply?	Need (N) Want (W) Depends (D)	Details	Your Monthly Cost
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Thing	Apply?	Need (N) Want (W) Depends (D)	Details	Suggested Useful Life	Suggested Cost	Suggested Monthly Cost	Your Monthly Cost
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