

Wisdom Investments

Client Name _____

Date _____

Spending Plan Worksheet

Get this information off your paychecks, social security statements, etc.

Gross Income Per Month:	#1	#2	<u>Totals</u>
Gross Salary	_____	_____	
Deductions from Gross Income:			
Federal Income Tax	_____	_____	
State Income Tax	_____	_____	
FICA	_____	_____	
Medicare	_____	_____	
Health Insurance	_____	_____	
Life Insurance	_____	_____	
401K/403B/Simple IRA	_____	_____	
Other	_____	_____	
Other	_____	_____	
Other	_____	_____	
Net Income (paycheck)	_____	_____	\$ _____
Other Income			
Social Security	_____	_____	
Pension Plans	_____	_____	
Other	_____	_____	
Other	_____	_____	
Other	_____	_____	
Total Other Income	_____	_____	_____
Total Income	_____	_____	\$ _____

Annual Expenses

Savings (do not include 401K/403B/IRA etc)

Debts:

Credit Cards _____
Family Loans _____
Other Loans _____
Total Debts \$ _____

CC Balance _____
Loan Balance _____
Balance _____

Life Insurance \$ _____

Food & Grocery \$ _____

Charitable Contributions \$ _____

Housing:

Mortgage or Rent _____
Home Insurance _____
Umbrella Insurance _____
Property Taxes _____
Electricity _____
Gas _____
Water and Sewer _____
Telephone & Cell Phone _____
Home Maintenance _____
Cable/Internet _____
Other _____
Total Housing \$ _____

Transportation:

Car Payments _____
Gas & Oil _____
Car Insurance _____
Annual Fees _____
Car Repair _____
Total Transportation \$ _____

Medical:

Doctor _____
Dentist _____
Eye Doctor _____
Drugs & Medicines _____
Medical Insurance _____
Other Medical _____
Total Medical \$ _____

Entertainment & Recreation:

Eating Out _____
Vacation _____
Activities _____
Babysitters _____
Personal - Husband _____
Personal - Wife _____
Trips _____
Other _____
Total Entertainment \$ _____

Clothing:

Wife _____
Husband _____
Kids _____
Total Clothing \$ _____

Miscellaneous:

Personal Care Items _____
Laundry & Cleaners _____
Education Expenses _____
Hair Care Services _____
Office Supplies _____
Internet access _____
Postage _____
Other _____
Total Miscellaneous \$ _____