

MONTHLY NET INCOME (AFTER TAXES)	TOTAL	NOTES
Primary income		
Secondary income		
Alimony/Child support		
Rent received		
Social Security Benefit		
Pension/Retirement		
Unemployment Income		
Food Stamps		
TOTAL MONTHLY INCOME	0	
HOUSING EXPENSE	PAYMENT	NOTES
Mortgage		
2nd Mortgage		
Rental property		
Association dues/lot rent		
Property taxes		
Home insurance		
Renter insurance		
TOTAL HOUSING EXPENSES	0	
UTILITIES	PAYMENT	PAST DUE
Heating gas/oil		
Electric		
Water		
Trash/disposal		
Cable/Satellite		
Telephone/landline		
Cell phone		
Internet		
Alarm service		
Miscellaneous utility		
TOTAL UTILITY EXPENSE	0	
SECURED DEBTS	PAYMENT	PAST DUE
Auto loan/lease		
Student loan		
IRS/State taxes		
TOTAL SECURED DEBTS	0	
UNSECURED DEBTS	PAYMENT	PAST DUE
TOTAL UNSECURED DEBTS	0	

FLEXIBLE HOUSEHOLD EXPENSES	TOTAL MONTHLY	NOTES
Groceries including paper products		
Dining out including lunches		
Entertainment		
Gasoline		
Car insurance		
Vehicle tags/license		
Car maintenance/Oil/Tires		
Health/Dental insurance		
Prescriptions		
Child care		
School supplies/tuition		
Home maintenance		
Birthdays/Holidays		
Child support		
Dues		
Personal care/grooming		
Pet care		
Clothing		
Dry cleaning/laundromat		
TOTAL HOUSEHOLD EXPENSES	0	

ASSETS	TOTAL	NOTES
Checking		
Savings		
401K		
403B		
Value of vehicles paid in full		
Value of Real Estate paid in full		
TOTAL ASSETS		

FINANCIAL SUMMARY	
Total Monthly Income	0
Total Monthly Housing Expenses	0
Total Monthly Utility Expenses	0
Total Monthly Secured Debts	0
Total Monthly Household Expenses	0
TOTAL DISPOSABLE INCOME	0

Client Name:

Date:

Type of meeting: