

Your Lifestyle Expenses					
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Use this worksheet to determine your current cost of living as well as your projected cost of living after a life change (ie. retirement, sale of home, etc.). List all figures in today's dollars and on an annual basis. Provide an annual allocation for irregular costs such as cars and renovations.

	Cui	rrent	Projected		
	Annual				
	Monthly	(Calculate)	Annual		
using				Healthcare	
lortgage / Rent		\$0		Medical (not covered by insurance)	
Condo/co-op fees		\$0		Prescription drugs	
Property tax		\$0		Vitamins / supplements	
Nater tax		\$0		Dental costs	
School tax		\$0		Glasses / Contacts	
Home insurance		\$0		Medical Insurance premiums	
Alarm System		\$0		Other	
Heating - (gas / oil / wood)		\$0		Personal	ı
Electricity / Hydro		\$0		Health club / exercise	I
Cable television		\$0		Grooming and cosmetics	
Telephone		\$0		Clothing / online shopping	
nternet		\$0		Dry cleaning and laundry	ı
Cell phone		\$0		Other	
Housekeeping/cleaning		\$0		Leisure / entertainment	
Garden/Lawncare		\$0		Vacations	
Snow removal		\$0		Entertainment (sports, theater)	l
Maintenance, repair		\$0		Subscriptions (Netflix, Spotify,etc)	ļ
Renovation (annualize)		\$0		Books / newspapers/ magazines	ļ
Furniture (annualize)		\$0		Hobbies	ļ
Other		\$0		Memberships (golf/club/etc.)	ļ
Food				Education, lessons, courses	l
Groceries		\$0		Other	l
Restaurants/Take-out		\$0		Insurance Costs	
Alcohol/Tobacco		\$0		Health insurance	ļ
Coffee/Snacks/etc		\$0		Life insurance	I
Other		\$0		Disability insurance	l
Children				Other	
uition / books / supplies		\$0		Debt Service	
Extra curricular / sports		\$0		Investment Loans	ļ
Nanny / babysitter		\$0		Personal Loans	L
Daycare		\$0		Lines of Credit	L
Allowance		\$0		Other	L
Child Support payments		\$0		Savings	
Tutors / therapist /etc		\$0		Retirement savings	ļ
Other		\$0		Education savings	ļ
Transportation				Other savings	ļ
Auto purchase (annualize)		\$0		Other savings	Ļ
_ease or loan payments		\$0		Miscellaneous	
Auto repair <i>(annualize)</i>		\$0		Alimony payments	L
Gasoline		\$0		Charity / Helping others	ļ
Auto licenses & registration	1	\$0		Gifts (birthdays/holidays)	l
Auto Insurance		\$0		Pets (food/veterinary etc.)	١
Parking costs		\$0		Fees (banking, accounting, etc)	
Tickets / Fines		\$0		Other	
Public transit / Bus Pass		\$0		Total current expenses	
Taxi / Uber		\$0		Total retirement expenses	Į
Satelite Radio		\$0		Input net take-home pay/yr	۱
Other		\$0		Discrepancy	ĺ
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