

BUDGET WORKSHEET



HOUSEHOLD	CURRENT	IN RETIREMENT
Mortgage		
Home Equity Loan		
Real Estate Taxes		
Homeowners Insurance		
Heat/fuel		
Electricity		
Telephone/Cable/Internet		
Cellular Phones		
Water, Sewer & Refuse Removal		
Laundry/Dry Cleaning		
Maid/Cleaning Service		
Furniture and Appliance repair/replacement		
Lawn and Garden		
Food (groceries, liquor, household supplies)		
Other: (Specify here _____)		
Subtotal (Living Expenses)	\$0.00	\$0.00

TRANSPORTATION	CURRENT	IN RETIREMENT
Gasoline		
Repairs		
Insurance/license/city stickers		
Payments/Replacements		
Alternative transportation		
Oil Changes, I-Pass, etc.		
Subtotal (Transportation Expenses)	\$0.00	\$0.00

PERSONAL	CURRENT	IN RETIREMENT
Clothing		
Grooming		
Medical		
Doctor		
Dentist		
Optical		
Medication		
Subtotal (Personal Expenses)	\$0.00	\$0.00

INSURANCE	CURRENT	IN RETIREMENT
Life Insurance Premiums		
Disability Insurance Premiums		
Other: (Specify here _____)		
Subtotal (Insurance Expenses)	\$0.00	\$0.00

This form collects data for informational purposes only and does not supersede any data or information reported on official Cambridge or sponsor company forms. This information is provided by you (the client). If any of the information is incorrect, you should notify your financial advisor. The information provided by you should be reviewed periodically and updated when either the information or your circumstances change.

MISC.	CURRENT	IN RETIREMENT
Clubs/Social Obligations/Entertainment		
Newspapers/Magazines/Books		
Gifts		
Donations, church or religious affiliation		
Vacations		
Subtotal (Misc. Expenses)	\$0.00	\$0.00
	CURRENT	IN RETIREMENT
Total Monthly Expenses:	\$0.00	\$0.00

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