



## Long-Term Goals

Retirement Age: \_\_\_\_\_

Education Funding for Children. Please Describe:

Other Large Purchase (E.G. New Home, Travel, Large Gift, Etc.). Please Describe and Estimate Amounts:

What affect would you like your wealth to have on you and your family during your life?

What other accomplishments do you want to attain in your life?

## Personal Budget

### *Fixed*

#### Housing

Home Loan Payment  
HELOC  
RE taxes/Insurance  
Telephone  
Utilities  
Cable / Internet Service  
Repairs & Maintenance  
Home Improvements  
Lawn/Pool  
Homeowner's Dues  
Food/Groceries  
Clothing  
Cleaners

Now Monthly	In Retirement Annually

#### Transportation

Repairs & Maintenance  
Insurance  
Fuel  
Other Transportation


#### Medical

Medical Insurance  
Dental Insurance  
Medications  
Deductibles  
Health Savings Account


#### Other Insurance

Life  
Disability  
Personal Liability


### Education Funding

Private School

529 Contributions -

529 Contributions -

529 Contributions -

529 Contributions -


### Miscellaneous Fixed Costs

<Enter Here>

<Enter Here>

<Enter Here>

<Enter Here>


### Loan Payments (Other Than Home)

Car Loan Payment

Car Lease

Credit Cards

Student Loan

Personal Loan Payments

Other Debt Payments

Other Debt Payments


### Discretionary

#### Recreation

Travel and Vacations

Entertainment/Dining Out

Sporting Events and Gym Membership

Hobbies


#### Gifts and Personal

Gifts

Personal Care

Children Games and Toys

Subscription and Dues

Pets


#### Miscellaneous Discretionary Costs

Misc

<Enter Here>

<Enter Here>

<Enter Here>
