



Personal Expenses Worksheet

Housing:

Mortgage, Property Taxes, Homeowners Insurance, etc.	\$
Utilities	
Water, Sewer, Trash	\$
Phones	\$
Internet	\$
Cable	\$
Electricity	\$
Heat	\$
Maintenance	\$

Personal:

Food & Groceries	\$
Dry-cleaning	\$
Personal Fitness/Gym	\$
Haircuts, Nails, Etc.	\$

Healthcare:

Health Insurance	\$
Doctor Visits	\$
Prescriptions	\$
Over-the-Counter Medications	\$
Dental	\$
Vision	\$
Life Insurance	\$

Transportation:

Fuel and Maintenance	\$
Auto Insurance	\$
Parking	\$
Public Transportation	\$

Recreation & Entertainment:

Restaurant Meals	\$
Travel/Vacations	\$
Hobbies	\$
Movies/Theatre	\$
Gifts/Charitable Giving	\$

Total Additional Retirement Savings Needed: \$ _____