



INCOME/EXPENSE DATA SHEET

Client _____
 Spouse _____

Advisor _____
 Date _____

	<i>Monthly</i>	<i>Annual</i>		<i>Monthly</i>	<i>Annual</i>
INCOME SOURCES:			HOUSING EXPENSES:		
Salary (C)	_____	_____	Mortgage/Rent	_____	_____
Salary (S)	_____	_____	Homeowners Insurance	_____	_____
Bonus	_____	_____	Property Taxes	_____	_____
Self Employment (C)	_____	_____	Maintenance/Repairs	_____	_____
Self Employment (S)	_____	_____	Cleaning/Yard	_____	_____
Social Security (C)	_____	_____	Utilities		
Social Security (S)	_____	_____	Electric/Gas/Oil	_____	_____
Pensions	_____	_____	Cable TV	_____	_____
Rental Income	_____	_____	Telephone	_____	_____
Investment Income	_____	_____	Water/Sewer	_____	_____
Other Income _____	_____	_____	Other Housing _____	_____	_____
Other Income _____	_____	_____	Other Housing _____	_____	_____
TAXES:			TRANSPORTATION:		
Fed Inc/Soc Sec/Med (C)	_____	_____	Car Payments/Lease	_____	_____
Fed Inc/Soc Sec/Med (S)	_____	_____	Fuel	_____	_____
State Income (C)	_____	_____	Car Insurance	_____	_____
State Income (S)	_____	_____	Tax/Reg/License	_____	_____
Other Taxes _____	_____	_____	Repairs/Maintenance	_____	_____
Other Taxes _____	_____	_____	Other Car _____	_____	_____
SAVINGS:			LIVING EXPENSES:		
Retirement Plan (C)	_____	_____	Groceries	_____	_____
Retirement Plan (S)	_____	_____	Childcare	_____	_____
Investment/Savings	_____	_____	Child Support/Alimony	_____	_____
Other Savings _____	_____	_____	Clothing	_____	_____
Other Savings _____	_____	_____	Education	_____	_____
			Medical/Dental	_____	_____
			Other Required _____	_____	_____

INSURANCE:

Life (C)	_____	_____
Life (S)	_____	_____
Disability (C)	_____	_____
Disability (S)	_____	_____
Health	_____	_____
Long Term Care	_____	_____

DEBT:

Mortgage	_____	_____
Home Equity Loan	_____	_____
Credit Card Debt	_____	_____
Student Loan	_____	_____

DISCRETIONARY EXPENSES:

Gifts	_____	_____
Dining Out	_____	_____
Charity	_____	_____
Personal Care	_____	_____
Club Dues	_____	_____
Pets	_____	_____
Recreation	_____	_____
Subscriptions	_____	_____
Vacation	_____	_____
Other Discretionary	_____	_____

ADDITIONAL NOTES:

Price Financial Group, LLC - 43 Danbury Rd, CT 06897 - PH:(203) 762-8499

www.PriceFinancialGroup.com

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Investment advice offered through Private Advisor Group, LLC, a Registered Investment Advisor and separate entity from LPL Financial.