

Financial Planning Information

Lifestyle Needs		Current	Retirement	Notes
Shelter				
Rent				
Property Taxes				
Property Insurance				
Maintenance & Improvements				
Utilities				
Misc. Shelter				
Sub Total				
Basic Personal				
Food				
Clothing				
Personal Care				
Medical & Dental				
Life & Disability				
Cleaning & Supplies				
Misc. Basic Personal				
Sub Total				
Discretionary Personal				
Entertainment & Restaurants				
Self Improvement				
Clubs & Memberships				
Hobbies				
Gifts				
Charitable Contributions				
Misc. Discretionary Personal				
Sub Total				
Travel & Vacation				
Travel & Vacation				
Travel Insurance				
RV Depreciation & Payments				
RV Insurance & Maintenance				
Taxes & Insurance				
Utilities & Maintenance				
Sub Total				
Transportation				
Depreciation & Payments				
Auto Insurance				
Maintenance				
Fuel & Oil				
Sub Total				
Total Lifestyle Needs				