



**INCOME AND EXPENSE SUMMARY**

<b>INCOME</b>	<b>MONTHLY</b>	<b>or</b>	<b>ANNUALLY</b>
<b>Work</b>			
Salary .....	\$ _____		\$ _____
Tips.....	\$ _____		\$ _____
<b>Other</b>			
Alimony .....	\$ _____		\$ _____
Bonus.....	\$ _____		\$ _____
Child Support.....	\$ _____		\$ _____
Dividends/Interest.....	\$ _____		\$ _____
Pension .....	\$ _____		\$ _____
Retirement Distributions.....	\$ _____		\$ _____
Social Security .....	\$ _____		\$ _____
_____	\$ _____		\$ _____
<b>Total Income .....</b>	<b>\$ _____</b>		<b>\$ _____</b>

<b>EXPENSES</b>	<b>MONTHLY</b>	<b>or</b>	<b>ANNUALLY</b>
<b>Household</b>			
Rent/Mortgage Payment (principal/interest) .....	\$ _____		\$ _____
Real Estate Taxes.....	\$ _____		\$ _____

Local Taxes.....	\$ _____	\$ _____
Homeowner's Insurance .....	\$ _____	\$ _____
Home Maintenance/Repair .....	\$ _____	\$ _____
Appliance Service Contracts.....	\$ _____	\$ _____
Home Supplies .....	\$ _____	\$ _____
Domestic Help .....	\$ _____	\$ _____
Dry Cleaning/Laundry Service .....	\$ _____	\$ _____
Exterminator .....	\$ _____	\$ _____
Lawn Service .....	\$ _____	\$ _____
Tree Maintenance.....	\$ _____	\$ _____
Snow Removal .....	\$ _____	\$ _____
Trash Removal .....	\$ _____	\$ _____
Sewer Authority .....	\$ _____	\$ _____
Electricity.....	\$ _____	\$ _____
Gas/Oil/Propane Heat .....	\$ _____	\$ _____
Water .....	\$ _____	\$ _____
Phone.....	\$ _____	\$ _____
Cable TV.....	\$ _____	\$ _____
Home Security.....	\$ _____	\$ _____
Furniture .....	\$ _____	\$ _____
_____	\$ _____	\$ _____



**INCOME AND EXPENSE SUMMARY**

<b>EXPENSES</b>	<b>MONTHLY</b>	or	<b>ANNUALLY</b>
<b>Transportation</b>			
Car Payment/Lease Payment.....	\$ _____		\$ _____
Car Insurance .....	\$ _____		\$ _____
Gasoline/Oil.....	\$ _____		\$ _____
Car Maintenance/Repair .....	\$ _____		\$ _____
Vehicle Inspection/Tags.....	\$ _____		\$ _____
Parking.....	\$ _____		\$ _____
E-Zpass/Tolls.....	\$ _____		\$ _____
Alternative Transportation .....	\$ _____		\$ _____
Air Travel.....	\$ _____		\$ _____
On-Star .....	\$ _____		\$ _____
Sirius/Pandora Radio .....	\$ _____		\$ _____
AAA.....	\$ _____		\$ _____
_____	\$ _____		\$ _____
<b>Child/Children</b>			
Day Care .....	\$ _____		\$ _____
Baby Sitters .....	\$ _____		\$ _____
Clothing/School Uniforms.....	\$ _____		\$ _____
Tuition/Room & Board .....	\$ _____		\$ _____

School Supplies/Books/Fees .....	\$ _____	\$ _____
School Lunches .....	\$ _____	\$ _____
School Transportation .....	\$ _____	\$ _____
School Activities .....	\$ _____	\$ _____
Tutors.....	\$ _____	\$ _____
Grooming Expenses .....	\$ _____	\$ _____
Doctor .....	\$ _____	\$ _____
Dentist .....	\$ _____	\$ _____
Optical.....	\$ _____	\$ _____
Medication .....	\$ _____	\$ _____
Allowance .....	\$ _____	\$ _____
After-School Lessons/Supplies	\$ _____	\$ _____
Vacation/Camp .....	\$ _____	\$ _____
Entertainment.....	\$ _____	\$ _____
_____	\$ _____	\$ _____
<b>Health and Medical</b>		
Disability Insurance.....	\$ _____	\$ _____
Health Insurance.....	\$ _____	\$ _____
Medical/Doctor Expense .....	\$ _____	\$ _____
Dental Insurance.....	\$ _____	\$ _____



**Entrust**  
FINANCIAL LLC®

**FOR A BETTER  
EXPERIENCE.**

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EXPENSES	MONTHLY	or	ANNUALLY
<b>Health and Medical</b>			
Dental Expense.....	\$ _____		\$ _____
Drug/Prescription Expense.....	\$ _____		\$ _____
Optical Expense.....	\$ _____		\$ _____
Orthodontist Expense.....	\$ _____		\$ _____
_____	\$ _____		\$ _____
_____	\$ _____		\$ _____
<b>Personal</b>			
Employment Uniforms.....	\$ _____		\$ _____
Unreimbursed Travel.....	\$ _____		\$ _____
Unreimbursed Education.....	\$ _____		\$ _____
Credit Card Payment.....	\$ _____		\$ _____
Credit Card Payment.....	\$ _____		\$ _____
Credit Card Payment.....	\$ _____		\$ _____
Credit Card Payment.....	\$ _____		\$ _____
Bank Fees.....	\$ _____		\$ _____
Personal Property Insurance....	\$ _____		\$ _____
Legal/Accounting Fees.....	\$ _____		\$ _____
Savings.....	\$ _____		\$ _____

Therapist/Counselor .....	\$ _____	\$ _____
Alimony.....	\$ _____	\$ _____
Child Support.....	\$ _____	\$ _____
Pets.....	\$ _____	\$ _____
Clothes/Shoes.....	\$ _____	\$ _____
Food/Groceries.....	\$ _____	\$ _____
Water Service.....	\$ _____	\$ _____
Internet Access .....	\$ _____	\$ _____
Cell Phone .....	\$ _____	\$ _____
Hair.....	\$ _____	\$ _____
Manicure/Pedicure.....	\$ _____	\$ _____
Miscellaneous/Other .....	\$ _____	\$ _____
Toiletries/Grooming Products..	\$ _____	\$ _____
Cosmetics.....	\$ _____	\$ _____
Church/Synagogue/Mosque.....	\$ _____	\$ _____
Charitable Donations .....	\$ _____	\$ _____
Gifts.....	\$ _____	\$ _____
Stamps/Stationary.....	\$ _____	\$ _____
Subscriptions/Books/Videos....	\$ _____	\$ _____
YMCA .....	\$ _____	\$ _____

