

LifePrint® Advantage: EXPENSE WORKSHEET

Client 1 Income:	
Client 2 Income:	
Additional Funds:	
Total Income:	\$
Total Annual Expenditures:	\$

Date:	/	/
Client Name 1:		
Client Name 2:		

Insurance	Monthly	Annual
Health Insurance		
Life Insurance		
Long-Term Care Insurance		
Disability Insurance		
Auto Insurance		
Homeowners Insurance		
Umbrella Insurance		
Other		
TOTAL	\$	\$

Income Taxes	Monthly	Annual
Federal		
State		
Local		
Other		
TOTAL	\$	\$

Housing	Monthly	Annual
Mortgage / Rent		
Property Taxes		
HOA Fees		
Maintenance and Repairs		
Cell Phone		
Cable / Internet		
Utilities (Gas/Electric)		
Other		
TOTAL	\$	\$

Transportation	Monthly	Annual
Vehicle payments (loan or lease)		
Fuel		
Maintenance		
Licensing/Registration		
Other		
TOTAL	\$	\$

Entertainment	Monthly	Annual
Dates		
Movies		
Concerts		
Games		
Travel		
Other		
TOTAL	\$	\$

Food	Monthly	Annual
Groceries		
Dining Out		
Fast Food		
Other		
TOTAL	\$	\$

Personal Care	Monthly	Annual
Beauty		
Clothing		
Gym/Fitness		
Other		
Other		
TOTAL	\$	\$

Savings	Monthly	Annual
Charity		
Investment		
School		
Retirement		
TOTAL	\$	\$

Loans	Monthly	Annual
HELOC		
RV/ATV/Boat Loan(s)		
Motorcycle Loan(s)		
School Loan(s)		
Credit Card(s)		
Other		
TOTAL	\$	\$



Securities offered through Securities America, Inc. (SAI), member FINRA/SIPC. Advisory services offered through Securities America Advisors, Inc. (SAA) and Arbor Point Advisors (APA). SOP, SAI, SAA & APA are separate entities.

2610 Lake Cook Road, Suite 250 • Riverwoods, IL 60015
P: 800.596.0253 | F: 800.596.0306 | 2NDpartners.com