

RETIREMENT LIFESTYLE BUDGET PLANNER

HOUSING	MONTHLY	QUARTERLY	SEMI-ANNUALLY	ANNUALLY
Insurance				
Property Taxes				
Oil				
Gas				
Rent/Mortgage				
Electric				
Water/Sewer				
Telephone				
Cable TV				
Repairs				
Cleaning				
Furniture/Appliances				
Other-Heating Expense				
Other				
Other				
TOTAL				

FOOD	MONTHLY	QUARTERLY	SEMI-ANNUALLY	ANNUALLY
Groceries				
Restaurants				
Other				
Other				
Other				
TOTAL				

TRANSPORTATION	MONTHLY	QUARTERLY	SEMI-ANNUALLY	ANNUALLY
Auto Payment				
Gas/Oil				
Insurance				
Repairs				
Public Transportation				
Parking				
Other-Excise Tax				
Other				
Other				
TOTAL				

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MEDICAL/DENTAL	MONTHLY	QUATERLY	SEMI-ANNUALLY	ANNUALLY
Medical Insurance				
Dental Insurance				
Non-reimbursed Medical Payments				
Prescriptions				
Dental Care				
Vision Care				
Other				
Other				
TOTAL				

INSURANCE	MONTHLY	QUATERLY	SEMI-ANNUALLY	ANNUALLY
Long-Term Care Insurance				
Life Insurance				
Other				
Other				
Other				
TOTAL				

PERSONAL	MONTHLY	QUATERLY	SEMI-ANNUALLY	ANNUALLY
Clothing				
Laundry/Dry Cleaners				
Grooming (Hair, nails, skin, etc.)				
Other				
Other				
Other				
TOTAL				

LOANS	MONTHLY	QUATERLY	SEMI-ANNUALLY	ANNUALLY
Credit Card Payments & Charges				
Other Installment Loans				
Other				
Other				
Other				
TOTAL				

RETIREMENT LIFESTYLE BUDGET PLANNER

ENTERTAINMENT	MONTHLY	QUATERLY	SEMI-ANNUALLY	ANNUALLY
Movies, Concerts, etc.				
Hobby Expenses				
Books/Magazines/Newspapers				
Club Memberships				
Vacation				
Other				
Other				
Other				
TOTAL				

OTHER	MONTHLY	QUATERLY	SEMI-ANNUALLY	ANNUALLY
Gifts				
Other Taxes				
Professional Services (CPA, Atty, ect.)				
Animal/Vet Expenses				
Organization Dues				
Charitable Giving				
Other				
Other				
TOTAL				

	MONTHLY	QUATERLY	SEMI-ANNUALLY	ANNUALLY
HOUSING				
FOOD				
TRANSPORTATION				
MEDICAL/DENTAL				
INSURANCE				
PERSONAL				
LOANS				
ENTERTAINMENT				
OTHER				
TOTAL				