

CLIENT	SAMPLE
AGE	24

CLIENT	YOU
AGE	

Consumption Item	Client Budget		
	Monthly	Yearly	%
Housing	400	4,800	14.1%
Food	300	3,600	10.6%
Clothing	200	2,400	7.1%
Personal	100	1,200	3.5%
Medical / Healthcare	175	2,100	6.2%
Tranportation	175	2,100	6.2%
Other - Child Care	0	0	0.0%
Other - School Loan	125	1,500	4.4%
Other - Education	150	1,800	5.3%
Other - Credit Card Payments	210	2,520	7.4%
Other - Debt / Installment Payments	0	0	0.0%
Other - Entertainment	100	1,200	3.5%
Other - Vacation	50	600	1.8%
Other - Charitable	125	1,500	4.4%
Other - Utilities (Gas, Light, Phone)	125	1,500	4.4%
Other - Auto Loan	335	4,020	11.8%
Other - Car Insurance	170	2,040	6.0%
Other - Cable	45	540	1.6%
Other - Mobile Cellular	50	600	1.8%
Other -	0	0	0.0%
Other -	0	0	0.0%
Other -	0	0	0.0%
Total Expenses	2,835	34,020	100.0%

Consumption Item	Client Budget		
	Monthly	Yearly	%
Housing			
Food			
Clothing			
Personal			
Medical / Healthcare			
Tranportation			
Other - Child Care			
Other - School Loan			
Other - Education			
Other - Credit Card Payments			
Other - Debt / Installment Payments			
Other - Entertainment			
Other - Vacation			
Other - Charitable			
Other - Utilities (Gas, Light, Phone)			
Other - Auto Loan			
Other - Car Insurance			
Other - Cable			
Other - Mobile Cellular			
Other -			
Other -			
Other -			
Total Expenses			

Pre - Tax Income	3,500	42,000
Real Estate Income	0	0
Business Income	0	0
Investment Income	0	0
Other Income	0	0
Total Income	3,500	42,000

Pre - Tax Income		
Real Estate Income		
Business Income		
Investment Income		
Other Income		
Total Income		

Discretionary Income	665	7,980
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Discretionary Income		
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This form is completed to give you an idea of your monthly and yearly income / expenses; a sample client is indicated