

Date ___/___/___



SNAPSHOT OF YOUR PRESENT BUDGET

I. FIXED EXPENSES

- 1. Rent or Mortgage \$ _____
 - 2. Public Service \$ _____
 - 3. Water, Trash & Sewer \$ _____
 - 4. Telephone \$ _____
 - 5. Auto Insurance \$ _____
 - 6. Life Insurance \$ _____
 - 7. Health Insurance \$ _____
 - 8. Other Insurance \$ _____
 - 9. Other Fixed Expenses \$ _____
- SUBTOTAL \$ _____**

II. VARIABLE EXPENSES

- 1. Grocery Store \$ _____
 - 2. Work Lunches \$ _____
 - 3. Clothing \$ _____
 - 4. Dry Cleaning \$ _____
 - 5. Auto, Gas, Repairs, etc. \$ _____
 - 6. Doctor & Medications \$ _____
 - 7. Dentist \$ _____
 - 8. Home Repairs \$ _____
 - 9. Child Care \$ _____
 - 10. Other Variable Expenses \$ _____
- SUBTOTAL \$ _____**

III. MISCELLANEOUS EXPENSES

- 1. Entertainment \$ _____
 - Restaurants \$ _____
 - Books and Mags \$ _____
 - Hobbies \$ _____
 - Amusements \$ _____
 - Club Dues \$ _____
 - Other \$ _____
 - 2. Church & Charities \$ _____
 - 3. Education \$ _____
 - 4. Gifts-Xmas, birthday, etc \$ _____
 - 5. Vacations \$ _____
 - 6. Savings \$ _____
 - 7. Investments \$ _____
 - 8. IRA & Keogh \$ _____
 - 9. Other Misc. Expenses \$ _____
- SUBTOTAL \$ _____**

IV. DEBT SERVICE

- 1. Total Non-Mortgage Consumer Loan Payments \$ _____
- SUBTOTAL \$ _____**

SUMMARY OF EXPENSES

- SUBTOTALS :**
- I. FIXED \$ _____
 - II. VARIABLE \$ _____
 - III. MISC. \$ _____
 - IV. DEBT SERVICE \$ _____
- TOTAL MONTHLY EXPENSE: \$ _____**

SOURCES OF ANNUAL INCOME

- Social Security Income** \$ _____
- Your earnings** \$ _____
(# of pay periods _____)
- Spouse's earnings** \$ _____
(# of pay periods _____)
- Rental** \$ _____
(# of payments _____)
- Dividends** \$ _____
(# of payments _____)
- Interest** \$ _____
(# of payments _____)

TOTAL MONTHLY INCOME: \$ _____
X 12 months

= ANNUAL INCOME \$ _____

Let us help you, your family and friends:

- Organize Existing Assets IRA and 401(k) rollovers College Savings
- Life, Disability Protection Long Term Care

Phone: 262-551-8900 • Fax: 262-551-8530 • Email: Invest@TheSchaefferGroupLLC.com
2315-30th Ave., Kenosha, WI 53144