



431 SW Ambaum Blvd.  
 Burien, WA. 98166  
 (206) 420-8520

Monthly & Annual Spending Tracker

Client:
Date:

**Instructions:** Please complete this form using the most accurate numbers possible. You may round up or down to the nearest dollar. This budget amount will be used in the updated plan Janice is preparing for you. If the amounts listed are not accurate, your plan will also be inaccurate. If you have had or anticipate any major expenses that are not expected annually, please include that separately or note it so it is not factored in.  
 \*\* If you are using a credit card for most of your day to day expenses, you only need to list the expenses that don't go on a credit card, and then in the credit card category, what the average or range your credit card balance is each month.

Expenses	Monthly	Annually	Balance	End Date
Mortgage				
Property Taxes				
Home Owners Insurance				
Condo Dues				
Car Payment 1				
Car Payment 2				
Car Insurance				
Gas				
Credit Card				
Credit Card				
Credit Card				
Health Insurance				
Life Insurance				
LTC Insurance				
Power				
Water				
Sewer				
Garbage				
Internet				
Cable				
Telephone (home)				
Telephone (cell)				
Food				
Entertainment				
Donations/Church				
Alarm Company				
Yard Care				
Housekeeper				
Childcare				
Education				
Misc				
Misc				
Misc				
Misc				
<b>Total:</b>	\$0	\$0		