

# Monthly household income and expenses

HOUSEHOLD INCOME (MONTHLY)		
	Client 1	Client 2
Employment income	\$	\$
Pension	\$	\$
Family allowance	\$	\$
Other government benefits	\$	\$
Rental income	\$	\$
Investment income	\$	\$
Other	\$	\$
<b>TOTAL*</b>	<b>\$</b>	<b>\$</b>

HOUSEHOLD COMMITMENTS (MONTHLY)		
Contributions to savings	Client 1	Client 2
Registered savings contributions	\$	\$
Non-registered savings contributions	\$	\$
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

Debt repayments	Client 1	Client 2
Loan payments	\$	\$
Credit card payments	\$	\$
<b>TOTAL</b>	<b>\$</b>	<b>\$</b>

\* Shaded fields to be completed by your financial security advisor.



It is understood and agreed that any information submitted will be used by the financial security advisor and Freedom 55 Financial for financial security planning purposes only.

<b>General expenses</b>	
Groceries	\$
Household	\$
Clothing	\$
Child care	\$
<b>TOTAL</b>	<b>\$</b>

<b>Health care</b>	
Paramedical (massage, chiropractor)	\$
Dental	\$
Vision	\$
Medication	\$
<b>TOTAL</b>	<b>\$</b>

<b>Housing costs</b>	
Mortgage/rent	\$
Taxes	\$
Insurance	\$
Electricity and heat	\$
Maintenance	\$
Water	\$
Phone	\$
Cable/Internet	\$
<b>TOTAL</b>	<b>\$</b>

<b>Recreation</b>	
Entertainment	\$
Dining	\$
Sports	\$
Hobbies/pastimes	\$
Club membership	\$
Subscriptions	\$
<b>TOTAL</b>	<b>\$</b>

<b>Transportation</b>	
Lease payments	\$
Transit	\$
Insurance	\$
Gas	\$
Maintenance	\$
Parking	\$
<b>TOTAL</b>	<b>\$</b>

<b>Miscellaneous</b>	
Gifts	\$
Charities	\$
Other	\$
<b>TOTAL</b>	<b>\$</b>

<b>MONTHLY HOUSEHOLD CASH FLOW SUMMARY</b>			
<b>TOTAL INCOME</b>		<b>TOTAL EXPENDITURES</b>	
Client 1 net income	\$	Contribution to savings	\$
Client 2 net income	\$	Debt repayments	\$
		General expenses	\$
		Housing costs	\$
		Transportation	\$
		Healthcare	\$
		Recreation	\$
		Miscellaneous	\$
Total net household income	\$	Total household expenses	\$
<b>Household discretionary annual income \$</b>			