

Expense Gathering Worksheet

Date Prepared:

	Estimate		Actual	
	Monthly Expenses	Annual Expenses	Monthly Expenses	Annual Expenses
Home Expenses				
Rent/Mortgage		\$ -		\$ -
Home Equity Loan/2nd Mortgage		\$ -		\$ -
Home Equity Line of Credit (HELOC)		\$ -		\$ -
Homeowners/Association Fee		\$ -		\$ -
Property Taxes		\$ -		\$ -
Telephone-Landline		\$ -		\$ -
Mobile phone/pager/mobile tablet		\$ -		\$ -
Internet		\$ -		\$ -
Security System		\$ -		\$ -
Cable/Satellite		\$ -		\$ -
Utilities		\$ -		\$ -
<i>Electricity</i>		\$ -		\$ -
<i>Gas</i>		\$ -		\$ -
<i>Fuel Oil/Propane/Wood</i>		\$ -		\$ -
<i>Water</i>		\$ -		\$ -
<i>Garbage/Trash</i>		\$ -		\$ -
<i>Sewer</i>		\$ -		\$ -
Landscape Maintenance/Lawn/Tree trimming		\$ -		\$ -
Pool supplies, cleaning, maintenance		\$ -		\$ -
Exterminator		\$ -		\$ -
Gen'l Home Repairs/Maintenance		\$ -		\$ -
Home Improvements/Upgrades		\$ -		\$ -
Housecleaning		\$ -		\$ -
Public transportation		\$ -		\$ -
Snow removal		\$ -		\$ -
Repairs anticipated in next 12 months		\$ -		\$ -
Appliances or Appliance repair		\$ -		\$ -
Heater or air conditioner filters or repairs		\$ -		\$ -
Other		\$ -		\$ -
Other		\$ -		\$ -
Other		\$ -		\$ -
Other		\$ -		\$ -
Miscellaneous		\$ -		\$ -
Total Home Expenses	\$ -	\$ -	\$ -	\$ -
Food				
Groceries & supplies		\$ -		\$ -
Restaurant/Dining Out		\$ -		\$ -
Wine/Spirits		\$ -		\$ -

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Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Delivered Milk	\$	-	\$	-
Total Food Expenses	\$	-	\$	-

Entertainment/Recreation

Entertainment (Excludes Dining Out)	\$	-	\$	-
Videos/CDs/DVDs	\$	-	\$	-
Movies and Theater	\$	-	\$	-
Hobbies	\$	-	\$	-
Hobbies, gaming online subscriptions	\$	-	\$	-
Classes/Lessons	\$	-	\$	-
Vacations/Travel	\$	-	\$	-
Other subscriptions	\$	-	\$	-
Gym/Health Club/Sports (not for kids)	\$	-	\$	-
Banking, music, video apps	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Memberships/Clubs	\$	-	\$	-
Total Entertainment/Recreation Expenses	\$	-	\$	-

Ancestry, Amazon Prime, Nintendo, Xbox, etc.

Netflix, Hulu, Spotify, Apple Music, Dating, Disney+, Mint, YNAB

Medical (After Insurance-Excludes Children)

Physicians	\$	-	\$	-
Dental/Orthodontist	\$	-	\$	-
Optometry/Glasses/Contacts	\$	-	\$	-
Prescriptions	\$	-	\$	-
Therapy	\$	-	\$	-
Chiropractic	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Alternative Health Care	\$	-	\$	-
Total Medical Expenses	\$	-	\$	-

Insurance

Life Insurance	\$	-	\$	-
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Expense Gathering Worksheet

Health (PostDivorce)		\$	-		\$	-
Disabilty		\$	-		\$	-
Long Term Care		\$	-		\$	-
Homeowners or Renters Insurance		\$	-		\$	-
Auto Insurance		\$	-		\$	-
Other - Dental ins.		\$	-		\$	-
Other - Vision Ins.		\$	-		\$	-
Earthquake Insurance		\$	-		\$	-
Other		\$	-		\$	-
Other		\$	-		\$	-
Other Insurance (Boat, Umbrella,...)		\$	-		\$	-
Total Insurance Expenses	\$	-	\$	-	\$	-

Transporation		\$	-		\$	-
Auto Payment		\$	-		\$	-
Fuel		\$	-		\$	-
Repair/Maintenance		\$	-		\$	-
Electrical charging (away from residence)		\$	-		\$	-
Other - vehicle tags/registration		\$	-		\$	-
Other		\$	-		\$	-
Other		\$	-		\$	-
License		\$	-		\$	-
Total Transportation Expenses	\$	-	\$	-	\$	-

Clothing Expenses		\$	-		\$	-
Clothing-Self		\$	-		\$	-
Other		\$	-		\$	-
Other		\$	-		\$	-
Other		\$	-		\$	-
Other		\$	-		\$	-
Other		\$	-		\$	-
Laundry/Dry Cleaning		\$	-		\$	-
Total Clothing Expenses	\$	-	\$	-	\$	-

Miscellaneous		\$	-		\$	-
Postage		\$	-		\$	-
Gifts/Holiday Expenses		\$	-		\$	-
Vitamins/Non-Prescription Drugs		\$	-		\$	-
Toiletries		\$	-		\$	-
Beauty Salon/Hair/Nails		\$	-		\$	-
Pet Care/Vet		\$	-		\$	-
Books/Newspapers/Magazines		\$	-		\$	-
Donations/Charity/Worship		\$	-		\$	-
Education/Tuition-Self (Non-Reimbursed)		\$	-		\$	-

Expense Gathering Worksheet

Cash	\$	-	\$	-
Safe Deposit Box	\$	-	\$	-
Home Furnishings	\$	-	\$	-
Household Supplies	\$	-	\$	-
Gambling	\$	-	\$	-
Savings	\$	-	\$	-
Union Dues (mandatory yes/no)	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Miscellaneous	\$	-	\$	-
Total Miscellaneous Expenses	\$	-	\$	-

Other Payments				
Quarterly Taxes & Additional Tax Payments	\$	-	\$	-
Alimony/Maintenance Payments	\$	-	\$	-
Child Support Payments	\$	-	\$	-
Student Loan	\$	-	\$	-
Eldercare Expenses	\$	-	\$	-
Professional Fees (Financial Planning, Acc't, Legal)	\$	-	\$	-
Service Fees (Banks, Investment Accts, ...)	\$	-	\$	-
Credit Card (list)	\$	-	\$	-
Credit Card	\$	-	\$	-
Credit Card	\$	-	\$	-
Credit Card	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other Debt	\$	-	\$	-
Total Other Payments Expenses	\$	-	\$	-

Total Monthly Expenses (Excluding Children)	\$	-	\$	-
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Monthly
Annual
Monthly
Annual

Child Related Expenses				
Education/Tuition	\$	-	\$	-
Religious education	\$	-	\$	-
School lunches	\$	-	\$	-

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Books/Supplies	\$	-	\$	-
Transportation	\$	-	\$	-
Babysitting	\$	-	\$	-
Daycare	\$	-	\$	-
Grooming	\$	-	\$	-
Sports/Camps/Lessons	\$	-	\$	-
Tutoring	\$	-	\$	-
Hobbies/Clubs	\$	-	\$	-
Toys/Games	\$	-	\$	-
Clothing	\$	-	\$	-
Clothing	\$	-	\$	-
Diaper service	\$	-	\$	-
Medical (Not Covered by Insurance)	\$	-	\$	-
Dental/Orthodontics (Not Covered by Insurance)	\$	-	\$	-
Optometry/Glasses/Contacts (Not Covered by Insur)	\$	-	\$	-
Prescriptions (Not Covered by Insurance)	\$	-	\$	-
Allowances	\$	-	\$	-
Gifts for holidays	\$	-	\$	-
Children's mobile phone	\$	-	\$	-
Children's tablet or computer (separate from parent's)	\$	-	\$	-
Children's educations or entertainment apps	\$	-	\$	-
Co-parenting app	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Other	\$	-	\$	-
Miscellaneous	\$	-	\$	-
Total Child Related Expenses	\$	-	\$	-
Total Monthly Expenses	\$	-	\$	-

Disney+, gaming apps,
educational apps
Ex: OurFamilyWizard, AppClose,
TalkingParents, etc.