

Budget Worksheet

Household

| Description | Monthly Amount | Start Date | End Date |
|---------------------------------|----------------|------------|----------|
| Mortgage - Principal & Interest | | | |
| Real Estate Taxes | | | |
| Homeowners Insurance | | | |
| Home Equity Loan | | | |
| Association Dues | | | |
| Rent | | | |
| Renters Insurance | | | |
| Utilities - Gas - Electric | | | |
| Water - Sewer | | | |
| Cable - Phone - Internet | | | |
| Maintenance & Improvement | | | |
| House Cleaning | | | |

Daily Living

| Description | Monthly Amount | Start Date | End Date |
|---------------|----------------|------------|----------|
| Food | | | |
| Dining Out | | | |
| Clothing | | | |
| Personal Care | | | |

Healthcare & Insurance

| Description | Monthly Amount | Start Date | End Date |
|--------------------------|----------------|------------|----------|
| Health Insurance | | | |
| Prescriptions | | | |
| Life Insurance | | | |
| Long Term Care Insurance | | | |
| Disability Insurance | | | |
| Veterinarian | | | |

Transportation

| Description | Monthly Amount | Start Date | End Date |
|----------------|----------------|------------|----------|
| Auto Loans | | | |
| Auto Insurance | | | |
| Fuel | | | |
| Repairs | | | |

Education & Loans

| Description | Monthly Amount | Start Date | End Date |
|-------------------------|----------------|------------|----------|
| Credit Cards | | | |
| Tuition - Student Loans | | | |
| Alimony | | | |
| Child Support | | | |

The information provided by these projections and calculators is for illustrative purposes only. Estimates included are based on information supplied by the client such as estimated Social Security benefits, pension benefits, projections of cost of living increases, inflation rates, and federal and state income tax rates. Current federal income tax tables are used in certain calculations. All of these are subject to change and will have an effect on the long range outcome shown in the analysis. Any interest rates are hypothetical and are not meant to represent any specific investment. Thomas Gold Solutions, LLC has done the due-diligence to maintain the accuracy of the information and calculations, but the assumptions do not encompass all situations. Thomas Gold Solutions, LLC does not make any guarantees on the outcome of any recommendations made based upon the above information. The projections or other information generated by this report regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results.

| Entertainment | | | |
|----------------------------|----------------|------------|----------|
| Description | Monthly Amount | Start Date | End Date |
| Parties & Events | | | |
| Sports - Hobbies - Lessons | | | |
| Membership Dues | | | |
| Vacation & Travel | | | |

| Miscellaneous | | | |
|----------------------|----------------|------------|----------|
| Description | Monthly Amount | Start Date | End Date |
| Charitable Donations | | | |
| Gifts | | | |
| Other | | | |



DRAKE
& ASSOCIATES, LLC

**2212 E. Moreland Blvd., Suite 200
Waukesha, WI 53186
(414) 409-7226
DrakeAndAssociates.net**

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