

# WEALTH FOCUS SOLUTIONS

## Anticipated Lifestyle Expenses

*Envision your lifestyle, and think about the expenses you incur — or might incur. Determine which expenses are must-have (essential) and which are nice-to-haves (discretionary). Take into consideration your own lifestyle and goals.*

Write your estimated Monthly Lifestyle Expenses  
in the Essential or Discretionary Column

		Essential	Discretionary
<b>Housing</b>	Mortgage/Rent/Fees	\$	\$
	Property Taxes & Insurance	\$	\$
	Utilities	\$	\$
	Household Improvement	\$	\$
	Household Maintenance	\$	\$
<b>Food</b>	At Home	\$	\$
	Dining Out	\$	\$
<b>Transportation</b>	Vehicle Purchase/Payments	\$	\$
	Auto Insurance and Taxes	\$	\$
	Fuel & Maintenance	\$	\$
	Public Transportation	\$	\$
<b>Health Care</b>	Health Insurance	\$	\$
	Medicare/Medigap	\$	\$
	Copays/Uncovered Medical Services	\$	\$
	Drugs & Medical Supplies	\$	\$
<b>Personal Insurance</b>	Life/Other	\$	\$
	Long-Term Care	\$	\$
<b>Personal Care</b>	Clothing	\$	\$
	Products & Services	\$	\$
	Entertainment	\$	\$
	Travel	\$	\$
	Hobbies	\$	\$
	Family Care/Education	\$	\$
	Income Taxes	\$	\$
	Charitable Contributions	\$	\$
	Other	\$	\$
	Subtotal		\$ -

**Total Essential & Discretionary Monthly Expenses**

\$ -
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FINANCIAL  
PARTNERS

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