



Client Name: _____

Income & Expense Summary

Income Sources	Monthly	Annual
Salary		
Social Security		
Alimony		
Child Support		
Rental Income		
Dividend/Interest Income		
Other		
Total Income		-

Income Sources (2nd Earner)	Monthly	Annual
Salary		
Social Security		
Alimony		
Child Support		
Rental Income		
Dividend/Interest Income		
Other		
Total Income		

Expenses		
HOUSING Costs	Monthly Cost	Annual Cost
Mortgage or rent		
Utilities		
Electricity		
Gas		
Water and sewer		
Telephone		
Cell Phone		
Cable		
Maintenance or repairs		
Other		
<i>Subtotals</i>		-

Expenses		
SAVINGS OR INVESTMENTS	Monthly Cost	Annual Cost
Retirement account		
Investment account		
Savings		
Other		
<i>Subtotals</i>		

FOOD/Household Expense	Monthly Cost	Annual Cost
Groceries		
Newspaper Subscription		
Yard Maintenance		
Bottled Water		
Other		
<i>Subtotals</i>		

TAXES	Monthly Cost	Annual Cost
Property		
HISD		
Other		
<i>Subtotals</i>		

INSURANCE	Monthly Cost	Annual Cost
Home Owners/Rental Insurance		
Health Insurance		
Life Insurance		
Automobile Insurance		
Flood Insurance		
Other		
<i>Subtotals</i>		

LEGAL	Monthly Cost	Annual Cost
Attorney		
Alimony		
Other		
<i>Subtotals</i>		

LOANS	Monthly Cost	Annual Cost
Personal		
Student		
Home Equity		
Credit Card		
Credit Card		
Credit Card		
Other		
<i>Subtotals</i>		

