

Wagner Planning

ENVISION • PLAN • ACHIEVE

4260 Galewood Street, Suite A
 Lake Oswego, OR 97035
 tel: 503-342-0038 | fax: 503-210-0311
WagnerPlanning.com

HOUSEHOLD EXPENSES

BUDGET ITEMS	PER MONTH
Household Expenses	
Mortgage / Rent	\$
Property Taxes / HOA	\$
Gas / Electric	\$
Water / Sewer	\$
Garbage	\$
Phone (Home and Cell)	\$
Internet / TV (Subscriptions: Netflix, etc)	\$
Yard / Maintenance / Cleaning	\$
Household Subtotal	\$
Auto Expenses	
Auto Loan / Auto Lease	\$
Auto Insurance	\$
Gasoline	\$
Repairs / Maintenance / Parking	\$
Auto Subtotal	\$
Insurance Expenses	
Medical Premium	\$
Life Insurance / LTC	\$
Home Owners / Renters / Umbrella	\$
Insurance Subtotal	\$

BUDGET ITEMS	PER MONTH
Entertainment	
Restaurants	\$
Travel / Vacation	\$
Subscriptions (Music, Books, Paper, etc)	\$
Hobbies / Sports / Theater	\$
Entertainment Subtotal	\$
Personal	
Personal Care (Hair, Nails, Clothing)	\$
Memberships (Gym, Golf, Costco, AAA)	\$
Medical / Dental Copays	\$
Medical Prescriptions	\$
Charity / Gifts / Other	\$
Personal Subtotal	\$
Other Expenses	
Child Care / Pet Care	\$
Groceries	\$
Professional Services (Attorney, CPA, etc)	\$
Savings / Other	\$
Other Expenses Subtotal	\$
GRAND TOTAL	

Securities offered by Registered Representatives through Private Client Services, Member FINRA/SIPC. Advisory products and services offered by Investment Advisory Representatives through Wagner Planning, a Registered Investment Advisor. Private Client Services and Wagner Planning are unaffiliated entities.

