



OF
RAYMOND JAMES®

	AMOUNT	FREQUENCY (MO./QTR./ANN.)	ANNUAL AMOUNT	% OF TOTAL
CHARITABLE GIVING				
FINANCIAL PLANNING				
Emergency Fund				
Retirement				
College				
Life Insurance				
Disability Insurance				
Long-Term Care Insurance				
Professional Services (CPA, Attorney, etc.)				
HOUSING				
Mortgage/Rent - Primary Residence				
Mortgage/Rent - Secondary Residence				
Taxes / Insurance (if not escrowed)				
Repairs & Maintenance Fund				
Furniture Replacement Fund				
UTILITIES / SERVICES				
Electricity				
Water & Sewer				
Gas				
Home & Cellular Phones				
Trash Collections				
TV & Internet				
Lawn Care				
House Cleaning				
Home Owners Association Dues				

	AMOUNT	FREQUENCY (MO./QTR./ANN.)	ANNUAL AMOUNT	% OF TOTAL
FOOD				
Groceries				
Restaurants				
TRANSPORTATION				
Car Payment 1				
Car Payment 2				
Fuel				
Repairs / Tires / Oil / Car Washes				
Car Insurance				
License and Taxes				
Car Replacement Fund				
HEALTHCARE				
Insurance Premiums				
Co-pays				
Prescriptions				
CLOTHING				
Cleaning/Laundry				
PERSONAL				
Life Insurance				
Hair Care				
Gifts				
Christmas Budget				
Unrestricted "Blow" Money				
EDUCATION				
Tuition				
Room / Board				
School Activities				
School Supplies				

	AMOUNT	FREQUENCY (MO./QTR./ANN.)	ANNUAL AMOUNT	% OF TOTAL
HOUSEHOLD EXPENSES				
Household Items (Utensils / Tools / Appliances)				
Pet Grooming & Vet				
Family Pictures				
RECREATION				
Family Entertainment				
Fitness Membership				
Golf				
Kid's Sports				
Kid's Music Lessons				
Swimming Lessons				
Babysitting				
Vacations				
DEBTS EX-MORTGAGE & CARS				
Credit Cards				
Student Loan				
UNREIMBURSED BUSINESS EXPENSES				
Travel				
Marketing				
Education				
Entertainment				
GRAND TOTAL				