

MONTHLY NECESSARY LIVING EXPENSES											
HOUSING & UTILITIES		Monthly Amt.	TRANSPORTATION		Monthly Amt.	OUT OF POCKET MEDICAL		Monthly Amt.	OTHER / MISCELLANEOUS		Monthly Amt.
Total Rent/Mortgage Payment(s)			Total Car Payment(s)			Health Insurance			Child / Dependent Care		
Electricity			Gas			Doctor Visits			Estimated Tax Payments		
Gas / Oil			Insurance			Dentist			Term Life Insurance		
Water / Trash / Sewer			Licenses			Eye Doctor			Retirement <small>(employer required)</small>		
Telephone/Cable/Internet			Registration			Prescriptions/Medicine			Retirement <small>(voluntary)</small>		
Cell Phone			Inspections/Smog			Recurring Medical Supplies			Union Membership Dues		
Property Taxes <small>(if separate from mortgage payment)</small>			Oil Changes/Lube			Eye Glasses			Delinquent State & Local Taxes <small>(minimum payment)</small>		
Mortgage Insurance <small>(if separate from mortgage payment & not in HOA)</small>			Repairs/Maintenance						Student Loans <small>(minimum payment)</small>		
Home Owner's Association Dues (HOA)			Parking						Court Ordered Payments <small>(documentation required)</small>		
Home Security			Toll Charges						Profit & Loss Statement <small>(net income)</small>		
Lawn Care			Public Transportation						State Installment Agreement <small>(attach letter if available)</small>		
Furniture Payments									Bank charges/fees <small>(not bank loan or credit card payments)</small>		
Cleaning Supplies									Contributions - Religious		
Exterminator									Contributions - Other		
Home Repairs									Postage		
									Taxes - Personal Property <small>(please provide detail)</small>		

OTHER EXPENSES NOT LISTED

*The IRS may allow other expenses in certain circumstances. For example, if the expenses are necessary for the health and welfare of the taxpayer or family, or for the production of income. Specify the expense and list the minimum monthly payment you are billed.

Description	Monthly Amt.	Description	Monthly Amt.

TOTAL MONTHLY NET INCOME TOTAL LIVING EXPENSES TOTAL DISPOSABLE INCOME
\$0 **\$0** **\$0**

ADDITIONAL IMPORTANT DOCUMENTS TO BE SUBMITTED BY YOU ASAP!

- Bank Statements for the Past 3 Months (All Accounts, All Pages)
- All Income Statements (Social Security Benefits Statement, Pension Statement, etc...)
- Pay Stubs for the Past 3-4 Pay Periods
- All Investment Account Statements (All Accounts, All Pages)

**Because the IRS and State Tax Authorities require the most updated information, we will periodically ask you for updates of these same documents. We appreciate your understanding and patience.*