

HOUSING	NEEDS	NOW	NEXT
Mortgage/Rent			
Property Tax			
Electricity			
Gas			
Water			
Repairs			
Home Owners Assoc.			
Gardener/Pool			
Housekeeper			
Home Insurance			
Other			

FOOD	NEEDS	NOW	NEXT
Groceries			
Dining			
Other			

TRANSPORTATION	NEEDS	NOW	NEXT
Vehicle Payments			
Insurance			
Fuel			
Maintence			
Other			

PERSONAL CARE	NEEDS	NOW	NEXT
Clothing			
Dry cleaning			
Hair/Nails			
Health Club & Gym			
Medical			
Health Insurance			
Other			

CHILDREN	NEEDS	NOW	NEXT
Tuition			
Housing			
Books			
Athletics			
Childcare			
Other			

DEBT	NEEDS	NOW	NEXT
Credit Card I			
Credit Card II			
Credit Card III			
Personal			
Student			
Other			

INSURANCE	NEEDS	NOW	NEXT
Life			
Long Term Care			

SUBSCRIPTIONS	NEEDS	NOW	NEXT
Music			
Streaming			
Cable/Internet			
Cellular Data			
Shopping			
Publications			
Other			

TAXES	NEEDS	NOW	NEXT
Federal			
State			
Local			
Personal			
Other			

SAVINGS	NEEDS	NOW	NEXT
Emergency Fund			
Investments			
Retirement			
Other			

ENTERTAINMENT	NEEDS	NOW	NEXT
Travel			
Sporting Events			
Concerts			
Movie Theatre			
Live Theater			
Country Club			
Aircraft/Boat/RV			
Activities			
Other			

GIVING	NEEDS	NOW	NEXT
Church			
Organizations			
Other			

PETS	NEEDS	NOW	NEXT
Food			
Medical			
Grooming			
Other			

LEGAL	NEEDS	NOW	NEXT
Attorney Fees			
Alimony			
Lein/Judgement			
Other			

TOTAL	NEEDS	NOW	NEXT
YEARLY			