

Budget

Data Gathering



EDUCATION • INVESTING • SUCCESS



P₃ Parks Capital

Personal and Family Expenses

Category	Monthly Budget		Category	Monthly Budget	
	Current	Retirement		Current	Retirement
Alimony	\$	\$	Entertainment	\$	\$
Bank Charges	\$	\$	Gifts	\$	\$
Books/Magazines	\$	\$	Groceries	\$	\$
Business Expense	\$	\$	Healthcare - Dental	\$	\$
Care for Parent/Other	\$	\$	Healthcare - Medical	\$	\$
Cash - Miscellaneous	\$	\$	Healthcare - Prescription	\$	\$
Cell Phone	\$	\$	Healthcare - Vision	\$	\$
Charitable Donations	\$	\$	Hobbies	\$	\$
Child Activities	\$	\$	Household Items	\$	\$
Child Allowance/Expense	\$	\$	Laundry/Dry Cleaning	\$	\$
Child Care	\$	\$	Personal Care	\$	\$
Child Support	\$	\$	Personal Loan Payment	\$	\$
Child Tutor	\$	\$	Pet Care	\$	\$
Clothing	\$	\$	Public Transportation	\$	\$
Clothing	\$	\$	Recreation	\$	\$
Clothing - Children	\$	\$	Self Improvement	\$	\$
Club Dues	\$	\$	Student Loan Payment	\$	\$
Credit Card Debt	\$	\$	Vacation/Travel	\$	\$
Dining	\$	\$	Other:	\$	\$
Education	\$	\$	Other:	\$	\$

Income

Category	Monthly Budget	
	Current	Retirement
Employment	\$	\$
Other:	\$	\$

Insurance

Category	Monthly Budget	
	Current	Retirement
Life for Client	\$	\$
Life for Co-Client	\$	\$
Long-Term Care (Client)	\$	\$
Long-Term Care (Co-Client)	\$	\$
Medical for Client	\$	\$
Medical for Co-Client	\$	\$
Umbrella Liability	\$	\$
Other:	\$	\$

Taxes

Category	Monthly Budget	
	Current	Retirement
Client FICA	\$	\$
Client Medicare	\$	\$
Co-Client FICA	\$	\$
Co-Client Medicare	\$	\$
Federal Income	\$	\$
State Income	\$	\$
Local Income	\$	\$
Other:	\$	\$
Umbrella Liability	\$	\$
Other:	\$	\$

Vehicle Expenses

Category	Monthly Budget	
	Current	Retirement
Loan Payment	\$	\$
Lease Payment	\$	\$
Insurance	\$	\$
Personal Property Tax	\$	\$
Fuel	\$	\$
Repairs/Maintenance	\$	\$
Parking/Tolls	\$	\$
Docking/Storage	\$	\$
Other:	\$	\$

Home Expenses

Category	Monthly Budget	
	Current	Retirement
First Mortgage	\$	\$
Second Mortgage	\$	\$
Equity Line	\$	\$
Real Estate Tax	\$	\$
Rent	\$	\$
Homeowner's Insurance	\$	\$
Association Fees	\$	\$
Electricity	\$	\$
Gas/Oil	\$	\$
Trash Pickup	\$	\$
Water/Sewer	\$	\$
Cable/Satellite TV	\$	\$
Internet	\$	\$
Telephone (land line)	\$	\$
Lawn Care	\$	\$
Maintenance - Major Repair	\$	\$
Maintenance - Regular	\$	\$
Furniture	\$	\$
Household Help	\$	\$
Other:	\$	\$

Vehicle Expenses

Category	Monthly Budget	
	Current	Retirement
Loan Payment	\$	\$
Lease Payment	\$	\$
Insurance	\$	\$
Personal Property Tax	\$	\$
Fuel	\$	\$
Repairs/Maintenance	\$	\$
Parking/Tolls	\$	\$
Docking/Storage	\$	\$
Other:	\$	\$



EDUCATION • INVESTING • SUCCESS



Parks Capital
YouTube Channel

To subscribe for free,
scan with your camera.

<https://www.youtube.com/c/ParksCapital>

P₃ Parks Capital

Phone: 1-585-248-5700 | Fax: 1-585-248-5703 |

Toll Free: 1-877-416-5700

www.ParksCapital.com



MoneyGuidePro.com
800.743.7092

The services and materials described herein are provided on an 'as is' and 'as available' basis, with all faults. The graphical illustrations herein do not represent client information or actual investments. Nothing contained in this presentation is intended to constitute legal, tax, accounting, securities, or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type. Envestnet MoneyGuide disclaims all warranties, express or implied, including, without limitation, warranties of merchantability or fitness for a particular purpose, title, non-infringement or compatibility. Envestnet MoneyGuide makes no representation or warranties that access to and use of the internet while utilizing the services as described herein will be uninterrupted or error-free, or free of viruses, unauthorized code or other harmful components. Envestnet MoneyGuide reserves the right to add to, change, or eliminate any of the services and/or service levels listed herein without prior notice to the advisor or the advisor's home office.