

Esther Fishman, Financial Advisor

CERTIFIED FINANCIAL PLANNER®

Portfolio Management Director

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Summary of Annual Expenses

Mortgage Or Rent	Real Estate Taxes	Furnishings	Phone/TV/ Internet	Utilities	Home Repair & Improvements	Homeowner's Insurance		
Annual Totals	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	
Groceries	Makeup/ Toiletries	Eating Out	Car Loan & other Loan pymts	Auto Insurance	Gas	Maintenance/ Repair on Car	Parking/Fares/ Tolls	
Annual Totals	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +
Medical Expenses	Dental Expenses	Drugs/Med. Supplies	Health/ Life Insurance	Disability Insurance	Clothing Purchases	Dry Cleaning/ Alterations	Spa/Nail/ Hair Salon	
Annual Totals	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +
Child/Elder/ Pet Care	Tuition/ After school	Books/ Supplies	News/Magazine Subscriptions	Gifts	Vacation	Entertainment/ Recreation	Hobbies	
Annual Totals	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +
Organization/ Gym/Club Dues	Charitable Contributions	Long-term Care Insurance	Business Expenses	IRA/401(k) Contributions	Brokerage Acct Contributions			=Total Annual Expenses
Annual Totals	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	_____ +	

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