

Basic Template

Household

Description	Monthly Amount	Start Date	End Date
Mortgage - Principal & Interest			
Real Estate Taxes			
Homeowners Insurance			
Home Equity Loan			
Association Dues			
Rent			
Renters Insurance			
Utilities - Gas - Electric			
Water - Sewer			
Cable - Phone - Internet			
Maintenance & Improvement			
House Cleaning			

Daily Living

Description	Monthly Amount	Start Date	End Date
Food			
Dining Out			
Clothing			
Personal Care			

Healthcare & Insurance

Description	Monthly Amount	Start Date	End Date
Health Insurance			
Prescriptions			
Life Insurance			
Long Term Care Insurance			
Disability Insurance			
Veterinarian			

Transportation

Description	Monthly Amount	Start Date	End Date
Auto Loans			
Auto Insurance			
Fuel			
Repairs			

Education & Loans

Description	Monthly Amount	Start Date	End Date
Credit Cards			
Tuition - Student Loans			
Alimony			
Child Support			

The information provided by these projections and calculators is for illustrative purposes only. Estimates included are based on information supplied by the client such as estimated Social Security benefits, pension benefits, projections of cost of living increases, inflation rates, and federal and state income tax rates. Current federal income tax tables are used in certain calculations. All of these are subject to change and will have an effect on the long range outcome shown in the analysis. Any interest rates are hypothetical and are not meant to represent any specific investment. Thomas Gold Solutions, LLC has done the due-diligence to maintain the accuracy of the information and calculations, but the assumptions do not encompass all situations. Thomas Gold Solutions, LLC does not make any guarantees on the outcome of any recommendations made based upon the above information. The projections or other information generated by this report regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results.

Entertainment

Description	Monthly Amount	Start Date	End Date
Parties & Events			
Sports - Hobbies - Lessons			
Membership Dues			
Vacation & Travel			

Miscellaneous

Description	Monthly Amount	Start Date	End Date
Charitable Donations			
Gifts			
Other			

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