

Name: Date Completed:

Financial Planning Questionnaire

Confidential Financial Review

Annual Expenditure Analysis Per Year

Item	Amount	
Basic - Home	Monthly	Annual
Mortgage/rent		
Property tax		
Water		
Electricity		
Gas		
TV - Satellite		
Alarm Security		
Home telephone internet		
Mobiles		
Home insurance/contents		
Food and housekeeping		
Cleaning		
Property maintenance		
Garden maintenance		
Sub-total		

Basic - Vehicles	Monthly	Annual
Car depreciation or payment		
Petrol/diesel		
Servicing and maintenance		
Car Insurance		
Car Other		
Sub-total		

Item	Amount	
Basic - Personal	Monthly	Annual
Clothing		
Wines/spirits alcohol		
Magazines - Subscriptions		
Beauty/grooming		
Public transport/taxis		
Childcare		
Cigarettes		
Charitable donations		
Gifts		
Pets		
Sub-total		

Basic - Medical	Monthly	Annual
Private medical insurance		
Dentist		
Optician		
Sub-total		

Luxury	Monthly	Annual
School Fees		
Sub-total		

Calculator

Enter monthly amount

Total per year

Item	Amount	
Leisure	Monthly	Annual
Sports/hobbies		
Holidays and travel		
Entertainment		
Eating out		
Cash withdrawals		
Sub-total		

Milestones - e.g World Cruise 2022 €30,000.

Sub-total	

Totals

Basic

Leisure

Luxury

Grand Total

Advisors Note: Not currently importable.