



CampbellFinancialPartners, LLC
FEE-ONLY FINANCIAL PLANNING

CASH FLOW INFORMATION

DATE: ___/___/___

Housing	Monthly	Annually
Mortgage / Rent		
Real Estate Taxes		
Fees: HOA, Condo, Parking, etc...		
Maintenance & Repairs		
Services (Cleaning / Lawn / Pool)		
Furnishings		
Other		
Utilities	Monthly	Annually
Electric / Gas		
Water		
Refuse collection		
Cable		
Telephone		
Cell phone		
Internet Service		
Other		
Food	Monthly	Annually
Groceries		
Dining Out		
Clothing / Grooming	Monthly	Annually
Clothing purchases		
Cleaning / Tailoring		

CASH FLOW INFORMATION, continued

Insurance	Monthly	Annually
Life insurance (Client)		
Life insurance (Co-Client)		
Medical premiums		
Dental premiums		
Vision care premiums		
Disability premiums (Client)		
Disability premiums (Co-Client)		
Homeowner's insurance		
Auto Insurance		
Recreation	Monthly	Annually
Vacations		
Entertainment		
Books / Magazines / Subscriptions		
Hobbies / Collections		
Membership dues / Expenses		
Personal Items	Monthly	Annually
Gifts		
Charitable contributions		
Tobacco / Alcohol		
Education		
Film / Developing		
Haircuts, color, perms		
Manicure, pedicure		
Cosmetics		
Cash withdrawals		

CASH FLOW INFORMATION, continued

Child Care / Pet Care	Monthly	Annually
Tuition / School Supplies		
Lessons / Camp / Allowance		
Child care		
Pet food		
Veterinary care		
Health Care	Monthly	Annually
Prescriptions / Medications		
Medical / Dental (out of pocket)		
Vision care / Glasses / Contacts		
Transportation	Monthly	Annually
Car Payment(s)		
Gasoline		
Maintenance / Repairs		
License/Registration/Tolls/Parking		
Other commuting expenses		
Other	Monthly	Annually
Alimony		
Child Support		
Professional Services		
Credit Card payments		
Other debt payments		

***Please fax the completed form to us at 1-877-395-8616
at least two days prior to our initial consultation.***