Income and Expenses

SYVERSON STREGE

Annual Income Sources

	Current	Anticipated Retirement
Head of Household Annual Salary:	$	$
Head of Household Annual Bonus:	$	$
Spouse's Annual Salary:	$	$
Spouse's Annual Bonus:	$	$
Head of Household Social Security:	$	$
Spouse's Social Security	$	$
Head of Household Pension Income:	$	$
Spouse's Pension Income:	$	$
Head of Household Retirement Income:	$	$
Spouse's Retirement Income:	$	$
Annual Annuity Income	$	$
Annual Taxable Investment Income	$	$
Municipal Bond Income:	$	$
Annual Dividend Income	$	$
S-Corp/LLC/Partnership Income	$	$
Self-Employment Income:	$	$
Farm Income:	$	$
Other Income:	$	$
Total:	$	$

Annual Expenses

	Current	Anticipated Retirement
Real Estate Taxes:	$	$
Auto License:	$	$
Charitable Donations:	$	$
Cafeteria Plan:	$	$
Non-Reimbursed Medical Expenses:	$	$
Lump Sum Living Expenses:	$	$
or Utility Expenses:	$	$
Rent:	$	$
Travel/Vacation:	$	$
Gifts:	$	$
Auto Service & Fuel:	$	$
Dues & Subscriptions:	$	$
Groceries:	$	$
Dining Out:	$	$
Lawn Care	$	$
Telephone (Cell & Home):	$	$
Computer/TV, Etc.:	$	$
Misc. Expenses:	$	$
Savings:	$	$
IRA/401k Contributions:	$	$
Education Expenses:	$	$
Federal Taxes:	$	$
State Taxes:	$	$
Homeowners Association Fees:	$	$
Other:	$	$
Total:	$	$
Total Annual Income:	$	$
Total Annual Expenses:	$	$
Net Discretionary Income:	$	$