



SPENDING CATEGORIES WORKSHEET

This worksheet will allow you to summarize your main monthly expenses. Please use this as a tool to complete the Proposed Annual Spending Plan. If you have questions, please contact your assigned CPT Institute Representative. Please print out this form twice to plan out your yearly spending.

Month/Year:						
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Mortgage/Rent						
Utilities						
Food (Groceries)						
ISM						

Insurance – Renters						
Insurance – Property						
Taxes – Property						
Household Maintenance						
Moving Related						
Facility						
Storage Fees						
Housing						

Phone						
Internet/Cable						
Subscriptions (TV/Music/Delivery)						
Memberships						
Subscriptions						

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Month/Year:						
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Transportation (Uber/Lyft, Taxi/ride services)						
Gas for Vehicle						
Mileage						
Vehicle Maintenance/Repairs						
Car Insurance						
DMV Fees						
Transportation						

Legal Fees						
Taxes – Government						
Health Insurance						
Caregiving – Personal						
Professional Services						

Personal Loan						
Credit Card						
Auto Loan						
Tuition Loan						
Loan to Trust Beneficiary						
Debt						

Trustee Fees						
Fees						

Home Purchase						
Vehicle Purchase						
Burial/Funeral						
Large Purchases						

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Month/Year:						
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Pet Expenses						
Clothing						
Dental						
Education						
Medical						
Travel						
Entertainment						
Electronics						
Food (Dining Out)						
Misc. Expenses						

True Link Card						
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