



**Spending Planner**  
Confidential Financial Review

**Instructions:**

Please input your data directly into this PDF and the calculations will automatically be calculated for you.  
There are blank spaces under each category for you to add any additional expenses you may have.

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Name:

Date Completed:

## Financial Planning Questionnaire

*Confidential Financial Review*

# Annual Expenditure Analysis Per Year

### Calculator

Enter monthly amount

Total per year



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

Item	Amount	
	Monthly	Annual
<b>Basic - Vehicles</b>		
Car depreciation or payment		
Petrol/diesel		
Servicing and maintenance		
Car Insurance		
Car Other		
<b>Sub-total</b>		

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

Item	Amount	
	Monthly	Annual
<b>Basic - Medical</b>		
Private medical insurance		
Dentist		
Optician		
<b>Sub-total</b>		

Item	Amount	
	Monthly	Annual
<b>Luxury</b>		
School Fees		
<b>Sub-total</b>		

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

Milestones - e.g World Cruise 2025 £30,000.		
<b>Sub-total</b>		

## Totals

Basic

Leisure

Luxury

**Grand Total**