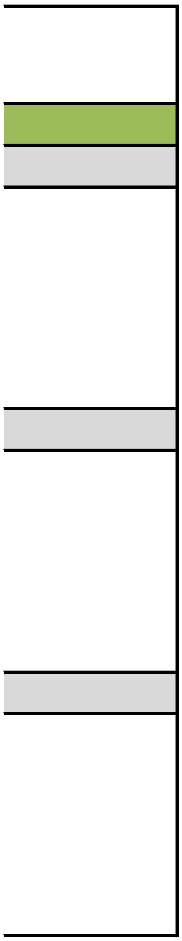
Name:

FINANCIAL GOALS
Short-Term Goals: less than 2 years
Medium-Term Goals: between 2-5 years
Long-Term Goals: over 5 years



INCOME	
	CURRENT LOCATION
City or Zip Code	
	SERVICE MEMBER MONTHLY INCOME
ENTITLEMENTS	CURRENT
Monthly Base Pay	
BAH (Housing)	
BAS	
OHA	
COLA	
Special Pay	
Hazard Duty Pay	
Flight Duty Pay	
Foreign Language Pay	
Family Separation Allowance	
Other Take Home Pay	
Military Retirement Pay	
Rental Home Income	
VA Benefits	
Child Support/Alimony	
GROSS MONTHLY INCOME	**$ -**

DEDUCTIONS	CURRENT
FITW (Federal Income Tax Withheld)	
FICA (Social Security)	
FICA (Medicare)	
State Income Tax	
AFRH (Armed Forces Retirement Home)	
SGLI and T-SGLI	
SGLI Family/Spouse	
TSP	
SDP	
Partial Pay	
Advance Payments	
Montgomery GI Bill	
Child Support/Alimony Paid	

DEDUCTIONS	**$ -**

NET MONTHLY INCOME	**$ -**

	SPOUSE MONTHLY INCOME
ENTITLEMENTS	**CURRENT**
Monthly Pay	
BAH (Housing)	
BAS	
OHA	
COLA	
Special Pay	
Hazard Duty Pay	
Flight Duty Pay	
Foreign Language Pay	
Family Separation Allowance	
Military Retirement Pay	
Rental Home Income	
VA Benefits	
Child Support/Alimony	
Other Take Home Pay/Second Job	
SPOUSE GROSS INCOME	**$ -**

DEDUCTIONS	**CURRENT**
FITW (Federal Income Tax Withheld)	
FICA (Social Security)	
FICA (Medicare)	
State Income Tax	
AFRH (Armed Forces Retirement Home)	
SGLI and T-SGLI	
SGLI Family/Spouse	
TSP	
SDP	
Partial Pay	
Advance Payments	
Montgomery GI Bill	
Child Support/Alimony Paid	

SPOUSE DEDUCTIONS	**$ -**
SPOUSE NET INCOME	$ -

	TOTAL INCOME
MONTHLY	**CURRENT**
GROSS INCOME	**$ -**
DEDUCTIONS	**$ -**
NET INCOME	**$ -**
ANNUAL	**CURRENT**
GROSS INCOME	**$ -**
NET INCOME	**$ -**

POTENTIAL LOCATION

PROJECTED
$ -

PROJECTED

$ -
$ -

PROJECTED
$ -
PROJECTED

$	-
$	-

PROJECTED
$ -
$ -
$ -
PROJECTED
$ -
$ -

MONTHLY EX	
	CURRENT LOCATION
City or Zip Code	0
LIVING EXPENSES	CURRENT
HOUSING TOTAL	**$ -**
Fees/HOA Fees/Pool Fees	
Furniture/Decorations	
Home Maintenance/Repairs	
Taxes	
UTILITIES TOTAL	**$ -**
Cable/Satellite	
Cell Phone/Phone Cards/Landline	
Internet	
Electricity	
Natural Gas/Propane	
Garbage	
Water/Sewage	
TRANSPORTATION TOTAL	**$ -**
Gasoline	
Parking	
Taxes/Registration/Licensing	
Taxi/Bus/Uber/Lyft/Train	
Vehicle Maintenance/Repairs	
FOOD TOTAL	**$ -**
Dining out	
Groceries	
Lunches	
Vending Machines	
INSURANCE TOTAL	**$ -**
Auto Insurance	

Dental Insurance	
Health Insurance	
Life Insurance	
Renters/Home Insurance	
HEALTHCARE	**$ -**
Dental	
Doctor/Hospital/Urgent Care	
Eye Care	
Prescriptions/Medications	
CLOTHING TOTAL	**$ -**
Laundry/Dry Cleaning	
New Clothing Purchase	
CHILD CARE TOTAL	**$ -**
Allowance	
Child Support	
Day Care	
Diapers/Wipes/Etc.	
PET CARE TOTAL	**$ -**
Food/Supplies	
Prescriptions/Medications	
Veterinarian/Grooming/Boarding	
PERSONAL TOTAL	**$ -**
Beauty Shop/Barber Shop/Salon	
Health Club/Organizational Dues	
Nails/Massage/Personal Grooming	
Personal Spending Fund	
Personal Supplies	
Tobacco/Alcohol	

EDUCATION TOTAL	**$ -**
Books/Supplies	
Educational Materials	
Lessons/Tutor	
LEISURE/HOBBIES/ENTERTAINMENT TOTAL	**$ -**
Athletic Events/Sporting Events	
Books/Magazines	
Computer Products	
Concerts/Theater	
DVDs & CDs	
Movie/Music Downloads	
Streaming Services	
Toys/Games	
Travel/Lodging	
CONTRIBUTIONS TOTAL	**$ -**
Charities	
Religious Donations	
GIFTS TOTAL	**$ -**
Holiday/Birthday/Anniversary	
MISCELLANEOUS TOTAL	**$ -**
ATM Fees/Bank Fees	
Deployment/TAD Expenses	
Membership Fees	
GRAND TOTAL	**$ -**

XPENSES	
POTENTIAL LOCATION	
0	
PROJECTED	REMARKS
$ -	
$ -	
$ -	
$ -	
$ -	

$ -	
$ -	
$ -	
$ -	
$ -	

$ -	
$ -	
$ -	
$ -	
$ -	
$ -	

	City or Zip Code
HOUSING CREDITOR	
Rent/Primary Home Mortgage	
Secondary Home Mortgage	
Rental Property	
Other (Vacation Home/Trailer/Time Share)	
	TOTAL

CREDITOR	**PURPOSE**
	TOTAL

DEBT	
CURRENT LOCATION	
0	
CURRENT MONTHLY PAYMENT	CURRENT BALANCE
$ -	$ -

CURRENT MONTHLY PAYMENT	CURRENT BALANCE
$ -	$ -

DEBT	
	CURRENT LOCATION
City or Zip Code	0
Total Gross Monthly Income	$ -
Total Monthly Debt Payments	$ -
DEBT-TO-INCOME RATIO	**0.00%**

TOTAL DEBT	**$ -**

(Debt-to-Income Ratio equals total monthly debt payments divided by gr

POTENTIAL LOCATION	
0	
PROJECTED MONTHLY PAYMENT	PROJECTED TOTAL COST
$ -	$ -

PROJECTED MONTHLY PAYMENT	PROJECTED TOTAL COST
$ -	$ -

T TO INCOME RATIO CALCULATIONS

POTENTIAL LOCATION	REMA
0	
$ -	
$ -	
0.00%	

$ -	

·oss income and multiplied by 100.)

REMARKS (MONTHS BEHIND, PAID BY ALLOTMENT, ETC.)

REMARKS (MONTHS BEHIND, PAID BY ALLOTMENT, ETC.)

ARKS

ASSETS, LIABILITIES, AND NET WORTH	
	CURRENT LOCATION
City or Zip Code	0
ASSETS	CURRENT
SAVINGS	$ -
Cash on Hand	
Checking Accounts	
Savings Accounts	
Emergency Savings	
TSP	
Certificates of Deposit (CDs)	
Cash Value of Life Insurance	
U.S. Savings Bonds	
Money Market Accounts	
Mutual Funds	
Stocks/Bonds	
College Funds	
401(k)/403(b)	
IRA/Pensions	
REAL ESTATE (MARKET VALUE)	$ -
Primary Home	
Secondary Home	
Rental Property	
PERSONAL PROPERTY	$ -
Vehicles/Motorcycles/Boats	
Furniture	
Jewelry	
TOTAL ASSETS	$ -

LIABILITIES	CURRENT
TOTAL DEBT	$ -

NET WORTH (ASSETS - LIABILITIES)	CURRENT
	$ -

REMARKS

City or Zip Code
Monthly
Gross Income
NET Income
Living Expenses
Debt Payments
MONTHLY SURPLUS OR DEFICIT
DEBT-TO-INCOME RATIO

ACTION
INCREASE
DECREASE LIVI
DECREA

SUMMARY
CURRENT LOCATION
0
$ -
$ -
$ -
$ -
$ -
0.00%

N PLAN
E INCOME
ING EXPENSES
SE DEBT

POTENTIAL LOCATION
0
$ -
$ -
$ -
$ -
$ -
0.00%