HUFFMAN•MAYER

WEALTH MANAGEMENT GROUP

of Wells Fargo Advisors



	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Year
Home													
Mortgage/rent													
Home insurance													
Home property tax													
Water													
Electric													
Gas													
Sewer													
Trash													
Internet/Cable/Landline													
Other Utilities													
Mobile telephone													
Home repairs													
Home improvement													
Home security													
Home totals													
Daily living													
Groceries													
Child care													
Dry cleaning													
Dining out													
Pet Supplies													
Clothing													
Cosmetics													
Salon/Barber													
Other													
Daily living totals													
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Investment and Insurance Products: Not FDIC-Insured / No Bank Guarantee / May Lose Value

Expenses

	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Year
Transportation	-			-	-	-		-	_				
Car Payment													
Gas/fuel													
Insurance													
Maintenance													
Repairs													
License/Registration													
Parking													
Public transportation													
Other													
Transportation totals													
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Health													
Meal Plan/Health Club													
Insurance													
Prescriptions													
Over-the-counter drugs													
Co-pays/out-of-pocket													
Vet Bill/pet medicines													
Life insurance													
Health totals													
Vacations													
Plane fare													
Accommodations													
Food													
Souvenirs													
Pet boarding													
Rental car													
Vacations totals													
Recreation													
Gym fees													
Concert/Movies/Plays													
Books													
Sports equipment													
Toys/child gear													
Other													
Recreation totals													



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Expenses

	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Year
Dues/subscriptions													
Magazines													
Newspapers													
Radio streaming													
Movie/TV streaming													
Apps/Gaming													
Religious Donations													
Charititable Donatons													
Home association													
Other													
Dues/subscription totals													
Financial obligations													
Long-term savings													
Retirement (401k, Roth)													
HSA													
Credit card payments													
College Savings													
Student Loans													
Income tax (additional)													
Other obligations													
Financial obligation totals													
Mice normente													
Misc. payments Other													
Other													
Other													
Other													
Other													
Other													
Other													
Other													
Misc. payments totals													

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Total expenses

The information you provide for this profile may conflict with and does not supersede the information on your account statements and/or trade confirmations, which are considered to be the official and accurate records of your account activity. The information you provide in this profile may not reflect all holdings or transactions, their costs, or proceeds in your account. Furthermore, personal information provided will not be used to update your account profile. If any information on your account profile needs to be revised, please address this with your Financial Advisor. Please contact your Financial Advisor for further information.

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