

**EXPANDED BUDGET INFORMATION**

**Housing**

Rent

Cooperative Apartment

- (a) Loan(s): \$ \_\_\_\_\_
  - (i) Interest \$ \_\_\_\_\_
  - (ii) Principal/amortization \$ \_\_\_\_\_
- (b) Maintenance \$ \_\_\_\_\_
- (c) Assessments \$ \_\_\_\_\_

Condominium

- (a) Mortgage(s): \$ \_\_\_\_\_
  - (i) Interest \$ \_\_\_\_\_
  - (ii) Principal/amortization \$ \_\_\_\_\_
- (b) Charges \$ \_\_\_\_\_
- (c) Assessments \$ \_\_\_\_\_
- (d) Association Fees \$ \_\_\_\_\_

House

- (a) Mortgage(s): \$ \_\_\_\_\_
  - (i) Interest \$ \_\_\_\_\_
  - (ii) Principal/amortization \$ \_\_\_\_\_

Real Property Taxes:

- (a) Town \$ \_\_\_\_\_
- (b) School \$ \_\_\_\_\_
- (c) Village \$ \_\_\_\_\_

Water Charges \$ \_\_\_\_\_

Utilities:

- (a) Fuel \$ \_\_\_\_\_
- (b) Gas \$ \_\_\_\_\_
- (c) Electricity \$ \_\_\_\_\_
- (d) Telephone \$ \_\_\_\_\_
  - (i) Home phone \$ \_\_\_\_\_
  - (ii) Cellular phone \$ \_\_\_\_\_

Household Maintenance:

- (a) Repairs \$ \_\_\_\_\_
- (b) Upkeep (e.g., furniture & carpet cleaning) \$ \_\_\_\_\_
- (c) Gardening, including lawn and grounds care and landscaping \$ \_\_\_\_\_
- (d) Exterminator \$ \_\_\_\_\_
- (e) Sanitation/carting \$ \_\_\_\_\_
- (f) Window washer \$ \_\_\_\_\_
- (g) Floor treatment, including scraping, staining and waxing \$ \_\_\_\_\_
- (h) Alarm/security system \$ \_\_\_\_\_
- (i) Pool (e.g. opening, closing and maintenance) \$ \_\_\_\_\_
- (j) Houseware/hardware \$ \_\_\_\_\_
- (k) Furniture and furnishings \$ \_\_\_\_\_

- (l) Linens and towels; "bed and bath" items \$ \_\_\_\_\_
- (m) Appliances:
  - (i) Maintenance (service contracts) \$ \_\_\_\_\_
  - (ii) Replacement (amortized cost) \$ \_\_\_\_\_
- (n) Painting
  - (i) Interior (amortized cost) \$ \_\_\_\_\_
  - (ii) Exterior (amortized cost) \$ \_\_\_\_\_

**Food**

- Supermarket \$ \_\_\_\_\_
- Deli/grocery store \$ \_\_\_\_\_
- Take-out \$ \_\_\_\_\_
- Ordering in \$ \_\_\_\_\_

**Apparel**

- Acquisition:
  - (a) Clothing \$ \_\_\_\_\_
  - (b) Footwear \$ \_\_\_\_\_
  - (c) Accessories \$ \_\_\_\_\_
  - (d) Jewelry \$ \_\_\_\_\_
- Maintenance:
  - (a) Dry cleaning \$ \_\_\_\_\_
  - (b) Laundry \$ \_\_\_\_\_
  - (c) Tailoring/alterations \$ \_\_\_\_\_

**Insurance**

- Life \$ \_\_\_\_\_
- Personal and real property (e.g., homeowners) \$ \_\_\_\_\_
- Fire, theft & liability \$ \_\_\_\_\_
- Disability \$ \_\_\_\_\_
- Medical (e.g., Blue Cross/Blue Shield) \$ \_\_\_\_\_
- Dental \$ \_\_\_\_\_
- Worker's compensation \$ \_\_\_\_\_
- Automotive \$ \_\_\_\_\_
- Umbrella policy \$ \_\_\_\_\_

**Health Care**

- Medical \$ \_\_\_\_\_
- Dental \$ \_\_\_\_\_
- Optical (e.g., glasses, contact lenses) \$ \_\_\_\_\_
- Pharmaceutical (e.g., prescription, medication) \$ \_\_\_\_\_
- Surgical \$ \_\_\_\_\_
- Nursing \$ \_\_\_\_\_
- Hospital \$ \_\_\_\_\_
- Orthodontia \$ \_\_\_\_\_
- Psychiatric (psychotherapy) \$ \_\_\_\_\_
- Chiropractor \$ \_\_\_\_\_
- Physical therapy \$ \_\_\_\_\_
- Acupuncture \$ \_\_\_\_\_

Homeopathic/holistic \$ \_\_\_\_\_  
Drugstore items \$ \_\_\_\_\_

**Household Help**

Baby-sitter/Child Caregiver:  
(a) Taxes \$ \_\_\_\_\_  
(b) Unemployment insurance \$ \_\_\_\_\_  
(c) Worker's compensation \$ \_\_\_\_\_  
(d) Bonus \$ \_\_\_\_\_

Domestic:  
(a) Housekeeper \$ \_\_\_\_\_  
(b) Maid \$ \_\_\_\_\_  
(c) Cleaning service \$ \_\_\_\_\_  
(d) Cook \$ \_\_\_\_\_  
(e) Butler \$ \_\_\_\_\_

**Automotive**

Payments \$ \_\_\_\_\_  
Gas and oil \$ \_\_\_\_\_  
Repairs (including tune-ups) \$ \_\_\_\_\_  
Car wash \$ \_\_\_\_\_  
Registration and license \$ \_\_\_\_\_  
Parking and tolls \$ \_\_\_\_\_  
Other \$ \_\_\_\_\_  
Car rentals \$ \_\_\_\_\_  
Garage (including tips) \$ \_\_\_\_\_  
Inspection \$ \_\_\_\_\_  
Replacement auto (cost pro-rated over  
historical length of car ownership) \$ \_\_\_\_\_  
Insurance \$ \_\_\_\_\_  
Radar detector \$ \_\_\_\_\_  
Car telephone \$ \_\_\_\_\_  
AAA Dues \$ \_\_\_\_\_

**Educational**

Nursery and pre-school

Primary and secondary:  
(a) Special education needs \$ \_\_\_\_\_  
(b) Speech therapy \$ \_\_\_\_\_  
(c) School field trips \$ \_\_\_\_\_  
(d) Club fees \$ \_\_\_\_\_  
(e) School photographs \$ \_\_\_\_\_  
(f) School breakfast \$ \_\_\_\_\_  
(g) School lunch \$ \_\_\_\_\_  
(h) School uniforms \$ \_\_\_\_\_  
(i) Apparel with school logo \$ \_\_\_\_\_  
(j) Special classes (e.g., computer and  
language labs) \$ \_\_\_\_\_  
(k) Parents' Association dues \$ \_\_\_\_\_

(l) Contributions to fund drives	\$ _____
(n) School supplies	\$ _____
(o) Books	\$ _____
(p) School transportation	\$ _____
(q) Tutoring	\$ _____
College:	
(a) Expenses in preparation for college:	\$ _____
(i) Preparatory courses for college entrance exams	\$ _____
(ii) College entrance exam fees	\$ _____
(iii) Round-trip transportation to colleges for interviews and tours	\$ _____
(iv) College application	\$ _____
(b) Expenses at College:	\$ _____
(i) Tuition	\$ _____
(ii) Room/housing (e.g. rent)	\$ _____
(iii) Board (e.g., food plan)	\$ _____
(iv) Laboratory fees	\$ _____
(v) Registration fees	\$ _____
(vi) Books	\$ _____
(vii) Supplies (e.g., notebooks, pens, pads)	\$ _____
(viii) Fees billed regularly by college	\$ _____
(ix) Health insurance fee	\$ _____
(x) Health services fee	\$ _____
(xi) Orientation fee	\$ _____
(xii) Round-trip transportation from college to home	\$ _____
(xiii) Parking	\$ _____
(c) Post-graduate	\$ _____
(d) Religious instruction	\$ _____
(e) School events (including graduation)	\$ _____
(f) Other:	
(i) Adult education courses	\$ _____
(ii) Courses taken as credit towards a degree	\$ _____

**Recreational**

Summer camp:	
(a) Tuition (fee)	\$ _____
(b) Trunk purchase	\$ _____
(c) Trunk shipping	\$ _____
(d) Camp store payment/allowance	\$ _____
(e) Special trips	\$ _____
(f) Camp uniforms	\$ _____
(g) Special camp clothing	\$ _____
(h) Sporting equipment (e.g., tennis racket, swimming/diving gear, tents, sleeping bags)	\$ _____
(i) Labels for clothing (e.g., including applying labels)	\$ _____
(g) Round-trip transportation to camp	

from home (e.g., plane or bus)	\$ _____
(h) Visiting day (e.g., transportation, lodging, gifts, car rental)	\$ _____
(i) Academic tutoring at camp	\$ _____
Vacations	
(a) Summer home rental and attendant costs (e.g., utilities, carting, lawn care, cable TV, pool)	\$ _____
Movies (including refreshments)	
Theater, ballet, etc.	\$ _____
Video rentals	\$ _____
Tapes, CD's, etc.	\$ _____
Cable television	\$ _____
Team sports	\$ _____
Country club/pool club	\$ _____
Health club/gym/exercise classes/trainer	\$ _____
Sporting goods	\$ _____
Hobbies	\$ _____
Enrichment activities/lessons:	
(a) Music:	\$ _____
(i) Instrument/instruction	\$ _____
(ii) Music school	\$ _____
(b) Dance:	\$ _____
(i) Ballet	\$ _____
(ii) Modern	\$ _____
(iii) Tap	\$ _____
(iv) Jazz	\$ _____
(c) Karate/Martial Arts	\$ _____
(d) Tennis	\$ _____
(e) Swimming	\$ _____
(f) Gymnastics	\$ _____
(g) Hockey	\$ _____
(h) Art:	
(i) Pottery	\$ _____
(ii) Painting	\$ _____
(iii) Sculpture	\$ _____
(iv) Acting/Drama	\$ _____
Birthday parties	\$ _____
Museums	\$ _____
Street fairs	\$ _____
Zoo	\$ _____
Ice skating	\$ _____
Roller skating/blading	\$ _____
Bowling	\$ _____
Swimming pool	\$ _____
Indoor recreation centers	\$ _____
Holiday parties/celebrations (e.g., Halloween, Valentine's Day, Chanukah, Passover, Easter, Christmas, New Year's)	\$ _____
Video club membership	\$ _____
Sporting events	\$ _____

Cultural events (e.g., Ballet, Opera, Symphony)	\$ _____
Circus	\$ _____
Entertainment at home (e.g., dinner/cocktail parties)	\$ _____

**Beauty Parlor/Barber**

Haircuts	\$ _____
Coloring	\$ _____
Shampoos/styling	\$ _____
Manicure (including color change)	\$ _____
Pedicure	\$ _____
Waxing	\$ _____
Electrolysis	\$ _____
Facial	\$ _____
Massage	\$ _____

**Gifts**

For children and grandchildren:	
(a) Birthday	\$ _____
(b) Chanukah/Christmas	\$ _____
(c) Easter	\$ _____
(d) Special events/occasions	\$ _____
Gifts for children's and grandchildren's teachers	\$ _____
Gifts for children's and grandchildren's child caregiver	\$ _____
Gifts for children's and grandchildren's friends:	
(a) Birthday	\$ _____
(b) Bar/Bat Mitzvahs	\$ _____
Gifts for holidays for relatives	\$ _____
Holiday "tips" for building personnel	\$ _____
Charitable contributions	\$ _____

**Miscellaneous**

Books, magazines, newspapers	\$ _____
Children's allowances	\$ _____
Flowers/plants (including service)	\$ _____
Toys and games	\$ _____
Records/CD's/Audio tapes/Cassettes	\$ _____
Stationery	\$ _____
Greeting cards	\$ _____
Postage	\$ _____
Film purchase	\$ _____
Film development	\$ _____
Attorneys' fees	\$ _____
Accountants' fees	\$ _____
Business manager fees	\$ _____
Fur storage and cleaning	\$ _____
Safe deposit box fee	\$ _____
Shoe repair	\$ _____
Facsimile machine (including purchase and	\$ _____

maintenance)  
Computer games and programs

\$ \_\_\_\_\_  
\$ \_\_\_\_\_