

Life-Stage Profile Worksheet

Name _____ Date _____ Life stage _____

Employment status _____ Marital status _____

Wages: _____ per _____ Additional job benefits: _____

Commission: _____ per _____

Total job value: _____ per _____

Taxes:

Federal: _____ Property: _____

Social Security: _____

Medicare: _____

State: _____

Housing:

Rent/mortgage: _____ House sale price: _____

Mortgage term: _____ Down payment: _____

Mortgage rate: _____ Mortgage amount financed: _____

Living expenses: Shared? (%) _____

Loans:

Utilities: _____ per _____ Amount of car loan: _____

Food: _____ per _____

Amount of student loan: _____

Gas and oil: _____ per _____

Water: _____ per _____

Phone: _____ per _____

TV/Internet: _____ per _____

Homeowners/renters insurance: _____

_____ per _____

Other Insurance: _____ per _____

Other Insurance: _____ per _____

Entertainment: _____ per _____

Savings: _____ per _____

IRA: _____ per _____

Investments: _____ per _____

Books: _____ per _____

Miscellaneous: _____ per _____

Credit card: _____ per _____

Credit card: _____ per _____

Credit card: _____ per _____

Credit card: _____ per _____

Amount of other loan: _____

_____ per _____

Amount of other loan: _____

_____ per _____

Other Income:

Student loans: _____ per _____

Rental property: _____ per _____

IRA withdrawal: _____ per _____

Social Security: _____ per _____

Inheritance: _____ per _____

Other: _____ per _____

Other: _____ per _____

Other: _____ per _____

Other: _____ per _____