

# 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 \_\_\_\_\_

\_\_\_\_\_ per \_\_\_\_\_

Gas and oil: \_\_\_\_\_ per \_\_\_\_\_

Amount of student loan: \_\_\_\_\_

Water: \_\_\_\_\_ per \_\_\_\_\_

\_\_\_\_\_ per \_\_\_\_\_

Phone: \_\_\_\_\_ per \_\_\_\_\_

Amount of other loan: \_\_\_\_\_

TV/Internet: \_\_\_\_\_ per \_\_\_\_\_

\_\_\_\_\_ per \_\_\_\_\_

Homeowners/renters insurance:  
\_\_\_\_\_ per \_\_\_\_\_

Amount of other loan: \_\_\_\_\_  
\_\_\_\_\_ per \_\_\_\_\_

Other Insurance: \_\_\_\_\_ per \_\_\_\_\_

Amount of other loan: \_\_\_\_\_

Other Insurance: \_\_\_\_\_ per \_\_\_\_\_

\_\_\_\_\_ per \_\_\_\_\_

Entertainment: \_\_\_\_\_ per \_\_\_\_\_

## Other Income:

Savings: \_\_\_\_\_ per \_\_\_\_\_

Student loans: \_\_\_\_\_ per \_\_\_\_\_

IRA: \_\_\_\_\_ per \_\_\_\_\_

Rental property: \_\_\_\_\_ per \_\_\_\_\_

Investments: \_\_\_\_\_ per \_\_\_\_\_

IRA withdrawal: \_\_\_\_\_ per \_\_\_\_\_

Books: \_\_\_\_\_ per \_\_\_\_\_

Social Security: \_\_\_\_\_ per \_\_\_\_\_

Miscellaneous: \_\_\_\_\_ per \_\_\_\_\_

Inheritance: \_\_\_\_\_ per \_\_\_\_\_

Credit card: \_\_\_\_\_ per \_\_\_\_\_

Other: \_\_\_\_\_ per \_\_\_\_\_

Credit card: \_\_\_\_\_ per \_\_\_\_\_

Other: \_\_\_\_\_ per \_\_\_\_\_

Credit card: \_\_\_\_\_ per \_\_\_\_\_

Other: \_\_\_\_\_ per \_\_\_\_\_

Credit card: \_\_\_\_\_ per \_\_\_\_\_

Other: \_\_\_\_\_ per \_\_\_\_\_