

# 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 \_\_\_\_\_

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

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

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

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

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

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

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

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 \_\_\_\_\_

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