M Tax Advisors

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Monthly Living Expense Worksheet

NEW DRAFT - Proposed replacement; original download unavailable.

Enter monthly amounts. Convert annual or irregular costs to a monthly estimate.

Full Name _____ Month / Year _____

Expense category	Monthly amount ($)
Rent or mortgage	
Property taxes (if not included above)	
Homeowners / renters insurance	
Electricity / heating / gas	
Water / sewer / trash	
Phone / internet	
Groceries and household supplies	
Meals away from home	
Vehicle loan or lease	
Fuel / transportation / transit	
Vehicle insurance / registration / repairs	
Health insurance	
Medical / dental / prescriptions	
Childcare / dependent care	
Education / student loan payments	
Life / disability / other insurance	
Credit card / other debt payments	
Clothing / personal care	
Charitable giving	
Entertainment / subscriptions	
Savings / retirement contributions	
Other expenses	
Total monthly expenses (enter your total)	

For your privacy and security, submit this completed worksheet only through our secure client portal.
Portal: https://mtaxadvisors.securefilepro.com/ - Please do not email completed financial worksheets.

New draft for review | Not an IRS form | No automatic calculations

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