

Name:

FINANCIAL GOALS

Short-Term Goals: less than 2 years

Medium-Term Goals: between 2-5 years

Long-Term Goals: over 5 years

INCOME		
City or Zip Code	CURRENT LOCATION	POTENTIAL LOCATION
SERVICE MEMBER MONTHLY INCOME		
ENTITLEMENTS	CURRENT	PROJECTED
Monthly Base Pay		
BAH (Housing)		
BAS		
OHA		
COLA		
Special Pay		
Hazard Duty Pay		
Flight Duty Pay		
Foreign Language Pay		
Family Separation Allowance		
Other Take Home Pay		
Military Retirement Pay		
Rental Home Income		
VA Benefits		
Child Support/Alimony		
GROSS MONTHLY INCOME	\$ -	\$ -
DEDUCTIONS		
DEDUCTIONS	CURRENT	PROJECTED
FITW (Federal Income Tax Withheld)		
FICA (Social Security)		
FICA (Medicare)		
State Income Tax		
AFRH (Armed Forces Retirement Home)		
SGLI and T-SGLI		
SGLI Family/Spouse		
TSP		
SDP		
Partial Pay		
Advance Payments		
Montgomery GI Bill		
Child Support/Alimony Paid		
DEDUCTIONS	\$ -	\$ -
NET MONTHLY INCOME	\$ -	\$ -
SPOUSE MONTHLY INCOME		
ENTITLEMENTS	CURRENT	PROJECTED
Monthly Pay		

BAH (Housing)		
BAS		
OHA		
COLA		
Special Pay		
Hazard Duty Pay		
Flight Duty Pay		
Foreign Language Pay		
Family Separation Allowance		
Military Retirement Pay		
Rental Home Income		
VA Benefits		
Child Support/Alimony		
Other Take Home Pay/Second Job		
SPOUSE GROSS INCOME	\$ -	\$ -

DEDUCTIONS	CURRENT	PROJECTED
FITW (Federal Income Tax Withheld)		
FICA (Social Security)		
FICA (Medicare)		
State Income Tax		
AFRH (Armed Forces Retirement Home)		
SGLI and T-SGLI		
SGLI Family/Spouse		
TSP		
SDP		
Partial Pay		
Advance Payments		
Montgomery GI Bill		
Child Support/Alimony Paid		
SPOUSE DEDUCTIONS	\$ -	\$ -
SPOUSE NET INCOME	\$ -	\$ -

TOTAL INCOME		
MONTHLY	CURRENT	PROJECTED
GROSS INCOME	\$ -	\$ -
DEDUCTIONS	\$ -	\$ -
NET INCOME	\$ -	\$ -
ANNUAL	CURRENT	PROJECTED
GROSS INCOME	\$ -	\$ -
NET INCOME	\$ -	\$ -

MONTHLY EXPENSES			
City or Zip Code	CURRENT LOCATION	POTENTIAL LOCATION	
	0	0	
LIVING EXPENSES	CURRENT	PROJECTED	REMARKS
HOUSING TOTAL	\$ -	\$ -	
Fees/HOA Fees/Pool Fees			
Furniture/Decorations			
Home Maintenance/Repairs			
Taxes			
UTILITIES TOTAL	\$ -	\$ -	
Cable/Satellite			
Cell Phone/Phone Cards/Landline			
Internet			
Electricity			
Natural Gas/Propane			
Garbage			
Water/Sewage			
TRANSPORTATION TOTAL	\$ -	\$ -	
Gasoline			
Parking			
Taxes/Registration/Licensing			
Taxi/Bus/Uber/Lyft/Train			
Vehicle Maintenance/Repairs			
FOOD TOTAL	\$ -	\$ -	
Dining out			
Groceries			
Lunches			
Vending Machines			
INSURANCE TOTAL	\$ -	\$ -	
Auto Insurance			
Dental Insurance			
Health Insurance			
Life Insurance			
Renters/Home Insurance			
HEALTHCARE	\$ -	\$ -	
Dental			
Doctor/Hospital/Urgent Care			
Eye Care			
Prescriptions/Medications			
CLOTHING TOTAL	\$ -	\$ -	
Laundry/Dry Cleaning			
New Clothing Purchase			
CHILD CARE TOTAL	\$ -	\$ -	
Allowance			
Child Support			
Day Care			
Diapers/Wipes/Etc.			
PET CARE TOTAL	\$ -	\$ -	
Food/Supplies			

Prescriptions/Medications			
Veterinarian/Grooming/Boarding			
PERSONAL TOTAL	\$ -	\$ -	
Beauty Shop/Barber Shop/Salon			
Health Club/Organizational Dues			
Nails/Massage/Personal Grooming			
Personal Spending Fund			
Personal Supplies			
Tobacco/Alcohol			
EDUCATION TOTAL	\$ -	\$ -	
Books/Supplies			
Educational Materials			
Lessons/Tutor			
LEISURE/HOBBIES/ENTERTAINMENT TOTAL	\$ -	\$ -	
Athletic Events/Sporting Events			
Books/Magazines			
Computer Products			
Concerts/Theater			
DVDs & CDs			
Movie/Music Downloads			
Streaming Services			
Toys/Games			
Travel/Lodging			
CONTRIBUTIONS TOTAL	\$ -	\$ -	
Charities			
Religious Donations			
GIFTS TOTAL	\$ -	\$ -	
Holiday/Birthday/Anniversary			
MISCELLANEOUS TOTAL	\$ -	\$ -	
ATM Fees/Bank Fees			
Deployment/TAD Expenses			
Membership Fees			
GRAND TOTAL	\$ -	\$ -	

ASSETS, LIABILITIES, AND NET WORTH		
City or Zip Code	CURRENT LOCATION	
	0	
ASSETS	CURRENT	REMARKS
SAVINGS	\$ -	
Cash on Hand		
Checking Accounts		
Savings Accounts		
Emergency Savings		
TSP		
Certificates of Deposit (CDs)		
Cash Value of Life Insurance		
U.S. Savings Bonds		
Money Market Accounts		
Mutual Funds		
Stocks/Bonds		
College Funds		
401(k)/403(b)		
IRA/Pensions		
REAL ESTATE (MARKET VALUE)	\$ -	
Primary Home		
Secondary Home		
Rental Property		
PERSONAL PROPERTY	\$ -	
Vehicles/Motorcycles/Boats		
Furniture		
Jewelry		
TOTAL ASSETS	\$ -	

LIABILITIES	CURRENT	REMARKS
TOTAL DEBT	\$ -	

NET WORTH (ASSETS - LIABILITIES)	CURRENT	REMARKS
	\$ -	