2017 BUSINESS PLANNING

Looking back over the past 12 months and thinking about 2017, estimate your monthly cost of living (not including the above desires). This will be based on your 2016 number:

Monthly Mortgage payment $\_\_\_\_\_\_\_\_\_\_\_

Monthly property taxes $\_\_\_\_\_\_\_\_\_\_\_

Homeowners Insurance $\_\_\_\_\_\_\_\_\_\_\_

Home Operating Expenses (energy, cleaning, maintenance) $\_\_\_\_\_\_\_\_\_\_\_

Health Insurance $\_\_\_\_\_\_\_\_\_\_\_

Automobile Insurance $\_\_\_\_\_\_\_\_\_\_\_

Automobile Payments $\_\_\_\_\_\_\_\_\_\_\_

Educational commitments (tuitions) $\_\_\_\_\_\_\_\_\_\_\_

Daycare/childcare expenses $\_\_\_\_\_\_\_\_\_\_\_

Quarterly income taxes $\_\_\_\_\_\_\_\_\_\_\_

Revolving Debt $\_\_\_\_\_\_\_\_\_\_\_

Installment debt $\_\_\_\_\_\_\_\_\_\_\_

Groceries $\_\_\_\_\_\_\_\_\_\_\_

Child Support/Alimony $\_\_\_\_\_\_\_\_\_\_\_

Clothing/Personal Care $\_\_\_\_\_\_\_\_\_\_\_

Gas $\_\_\_\_\_\_\_\_\_\_\_

Entertainment (eating out, movies, etc) $\_\_\_\_\_\_\_\_\_\_\_

Utilities $\_\_\_\_\_\_\_\_\_\_\_

Other $\_\_\_\_\_\_\_\_\_\_\_

Total Estimated Cost of Living (a) $\_\_\_\_\_\_\_\_\_\_\_

**Yearly Cost of Living (a x 12) (b) $\_\_\_\_\_\_\_\_\_\_\_**

2017 BUSINESS PLANNING

Looking back over the past 12 months and thinking about 2017, estimate your monthly business expenses. This will be based on your 2016 number as well incesase variable expenses that will increase as your business increases.

Monthly Lease payment $\_\_\_\_\_\_\_\_\_\_\_

Business Insurance $\_\_\_\_\_\_\_\_\_\_\_

General/Misc Business Operating Expenses $\_\_\_\_\_\_\_\_\_\_\_

Educational commitments (tuitions) $\_\_\_\_\_\_\_\_\_\_\_

Quarterly taxes $\_\_\_\_\_\_\_\_\_\_\_

Revolving Debt $\_\_\_\_\_\_\_\_\_\_\_

Installment debt $\_\_\_\_\_\_\_\_\_\_\_

Supplies $\_\_\_\_\_\_\_\_\_\_\_

Gas $\_\_\_\_\_\_\_\_\_\_\_

Entertainment $\_\_\_\_\_\_\_\_\_\_\_

Other $\_\_\_\_\_\_\_\_\_\_\_

Other $\_\_\_\_\_\_\_\_\_\_\_

Total Estimated Monthly Business Expenses (c) $\_\_\_\_\_\_\_\_\_\_\_

**Yearly Business Expenses (c x 12) (d) $\_\_\_\_\_\_\_\_\_\_\_**

2017 BUSINESS PLANNING

know your numbers

**Yearly Cost of Living (a x 12) (b) $\_\_\_\_\_\_\_\_\_\_\_**

**Yearly Business Expenses (c x 12) (d) $\_\_\_\_\_\_\_\_\_\_\_**

**Breakdown your clients by type & income**

For example:

35% Will 40% Estate Planning 25% Miscellaneous

\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Average Income/Client $\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Average Income/Client $\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Average Income/Client $\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Average Income/Client $\_\_\_\_\_\_\_\_\_\_\_\_