



Sound Life Financial Services  
*Sound Financial Advice for Life*

## Budget Planner

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Client 1	
Client 2	
Authorised representative (financial adviser)	
Date of completion	
Version of FSG provided	
Date of FSG provided	



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Charter Financial Planning is a member of the AMP Group. The AMP Group includes companies formerly part of the Australian and New Zealand operations of AXA Asia Pacific Holdings Limited.

## Budget planner

	Weekly expense	Monthly expense	Annual expense	Total annual expenses
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### Primary residence

Home	\$	\$	\$	\$
Council rates	\$	\$	\$	\$
Rent or mortgage	\$	\$	\$	\$
Water rates	\$	\$	\$	\$
Home and contents insurance	\$	\$	\$	\$
Land rates	\$	\$	\$	\$
Maintenance or repairs	\$	\$	\$	\$

### Investment property

Rent or mortgage	\$	\$	\$	\$
Water rates	\$	\$	\$	\$
Home and contents insurance	\$	\$	\$	\$
Land rates	\$	\$	\$	\$
Maintenance or repairs	\$	\$	\$	\$

### Repayments

Car loan	\$	\$	\$	\$
Credit cards	\$	\$	\$	\$
Store cards	\$	\$	\$	\$
Personal loan	\$	\$	\$	\$
Equipment rental	\$	\$	\$	\$
Other debt	\$	\$	\$	\$

### Utilities

Water	\$	\$	\$	\$
Electricity	\$	\$	\$	\$
Gas	\$	\$	\$	\$



Telephone	\$	\$	\$	\$
Internet	\$	\$	\$	\$
Pay TV	\$	\$	\$	\$

### Transport

Petrol	\$	\$	\$	\$
Public transport	\$	\$	\$	\$
Vehicle registration	\$	\$	\$	\$
Vehicle maintenance or repairs	\$	\$	\$	\$
Vehicle registration	\$	\$	\$	\$

### Food

Groceries	\$	\$	\$	\$
Eating out – lunches	\$	\$	\$	\$
Eating out – dinner	\$	\$	\$	\$

### Education

School fees	\$	\$	\$	\$
Uniforms	\$	\$	\$	\$
Self-education	\$	\$	\$	\$
Books	\$	\$	\$	\$
Out of school activities	\$	\$	\$	\$
Child minding or care	\$	\$	\$	\$

### Medical

Health insurance	\$	\$	\$	\$
Doctor	\$	\$	\$	\$
Dentist	\$	\$	\$	\$
Optometrist	\$	\$	\$	\$
Alternative therapies	\$	\$	\$	\$
Other, eg physiotherapy	\$	\$	\$	\$



**Personal**

Clothing	\$	\$	\$	\$
Personal grooming	\$	\$	\$	\$
Hobbies	\$	\$	\$	\$
Sport, eg gym membership, clubs	\$	\$	\$	\$
Holidays	\$	\$	\$	\$
Gifts	\$	\$	\$	\$
Alcohol	\$	\$	\$	\$
Cigarettes or tobacco	\$	\$	\$	\$
Cinema, videos and DVDs	\$	\$	\$	\$
Mobile phone	\$	\$	\$	\$
Donations	\$	\$	\$	\$
Magazine or newspaper subscriptions	\$	\$	\$	\$
Other, eg dry cleaning, fines, ad hoc purchases	\$	\$	\$	\$

**Other**

Life, income or term insurance	\$	\$	\$	\$
Pets, eg food or vet bills	\$	\$	\$	\$
Special projects	\$	\$	\$	\$
Other	\$	\$	\$	\$
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>



