

	Monthly	Qtrly	Annual		Monthly	Qtrly	Annual		Monthly	Qtrly	Annual
Housing				Entertainment				Medical Expenses			
Utilities				Dining Out				Co-Pay			
Gas/Elec				Sports Tickets				Deductible			
Water				Theater Tickets				Rx			
Utilities				Hobbies				Dental			
Cellphone				Other				Other			
Cable/Internet				leisure				Eye			
Maintenance				Other				Check-ups			
Maintenance				Total:	-	-	-	Contacts			
Cleaning				Personal Care				Glasses			
Lawn				Dry Cleaning				Total:	-	-	-
Garbage				Health Club				Insurance Premiums			
Home				Misc				Medical			
Rent				Other				Dental			
HOA Fees				Total:	-	-	-	Eye			
Other				Clothing				Disability			
Other				Adult				Life			
Total:	-	-	-	Adult				Disability			
Installment Debt				Children				Life			
Mortgage				Children				Disability			
Home Eq Loan				Total:	-	-	-	LTC			
Consolidation				Furnishings				Homeowner			
Student Loans				Indoor				Auto			
Other				Outdoor				Other			
Credit Cards				Total:	-	-	-	Total:	-	-	-
Bank Charges				Business - other				Taxes & License			
Other				Supplies				Property			
Total:	-	-	-	Phone				School			
Child Care				Office				Total:	-	-	-
Daycare				legal & professional				Business Expenses			
Sports Activities				Total:	-	-	-	General			
Other				Vacations & Holidays				Education			
Total:	-	-	-	Airfare				Total:	-	-	-
Food & Beverages				Hotels				Retirement Savings			
Groceries				Food				401k,403b,457	-		
herbal				Entertainment				IRA			
Household Supplies				Auto				ROTH IRA			
Other				Boat Dock				Total:	-	-	-
Total:	-	-	-	Other				Pets			
Transportation				Total:	-	-	-	Food			
Loan/Lease				Gifts				Vet			
Gas/Elec				Holidays				Other			
Maintenance				Birthdays				Total:	-	-	-
Tags/Inspection				Weddings				Gifts to Charity			
Other				Other				Worship			
Total:	-	-	-	Total:	-	-	-	Other			
Monthly	-	-	-	Quarterly	-	-	-	Total:	-	-	-
Name: _____				Date: _____				Annual:			
								Total:	-	-	-

This is a supplemental document and must be supported with, and cannot be used in lieu of, an Equitable Advisors approved fact finding, risk tolerance questionnaire and client profile materials. Securities offered through Equitable Advisors (NY, NY 212-314-4600), member FINRA, SIPC (Equitable Financial Advisors in MI & TN). Investment advisory products and services offered through Equitable Advisors, LLC an SEC-registered investment advisor. Annuity and insurance products offered through Equitable Network, LLC, which conducts business in California as Equitable Network Insurance Agency of California, LLC. AGE-144522 (6/20) (Exp. 6/22)