

MONTHLY RECURRING EXPENSES – MAY AFFECT BENEFITS IF PAID BY TRUST

Housing	
Rent	\$
Mortgage	\$
Insurance	\$
Taxes	\$
Food	
Groceries	\$
Restaurants	\$

Utilities	
Heating	\$
Electricity	\$
Trash/Garbage	\$
Water	\$
Sewer	\$

MONTHLY RECURRING EXPENSE TOTAL: \$ _____ (Housing, Utilities and Food, only)

ANTICIPATED ONE-TIME EXPENSES

Please include any one-time expenses that you would like the trust to pay for in the near future. This list does not need to be comprehensive, but it will help us think about your cash needs over the next couple of years. We have provided a few examples below.

One-time expenses	Amount	Anticipated date
Example: New computer	\$600	Within the next year
Example: New running shoes	\$120	March 2017
Example: Stationary bike	\$1000	Spring 2017
Example: Acupuncture	\$150	July 2016
Example: Elective eye surgery	\$2000	2018
Example: Credit Card debt		
Example: Reimbursements to others		

ANTICIPATED ONE-TIME DISBURSEMENT TOTAL: \$ _____