

## Sample "My Parent's" Monthly/Quarterly Annual Budget

### Income

	<u>One Time</u>	<u>Quarterly</u>	<u>Monthly</u>	<u>Annual</u>
<b>Pensions</b>				
Social Security			\$ 1,500	\$ 18,000
Former Employer Trust			1,750	21,000
<b>Subtotal Pensions</b>	-	-	3,250	39,000
<b>Investment RMD's</b>				
Investment Co. #1	-		2,250	27,000
Investment Co. #2 (July)	7,500		-	7,500
Investment Co. #3			725	8,700
<b>Total RMD's</b>	7,500	-	2,975	43,200
<b>Other</b>				
Employer Medical Acct (Dec)	1,200		-	1,200
IRS Refund (Mar)	500			500
<b>Total Other Income</b>	1,700	-	-	1,700
<b>Total Income</b>	9,200	-	6,225	83,900

### Expenses

Assisted Living Apartment	-	-	4,250	51,000
IRS/WH Taxes - Quarterly	-	2,500	-	10,000
Misc Groceries, etc.	-	-	500	6,000
Gifts for Relatives	2,000	-	-	2,000
United Health	-	-	250	3,000
Meals/Entertainment			200	2,400
Travel	2,000	-	-	2,000
Cash/Misc	-	-	100	1,200
Charter - TV/Internet	-	-	100	1,200
Charity	600	-	-	600
Newspaper	330	-	-	330
Dentist	-	125	-	500
Eye Doc	400	-	-	400
Salon	-	-	55	330
Rx's	-	-	75	900
Miscellaneous	-	-	170	2,040
<b>Total Expenses</b>	5,330	2,625	5,700	83,900

### **Surplus/Deficit**

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