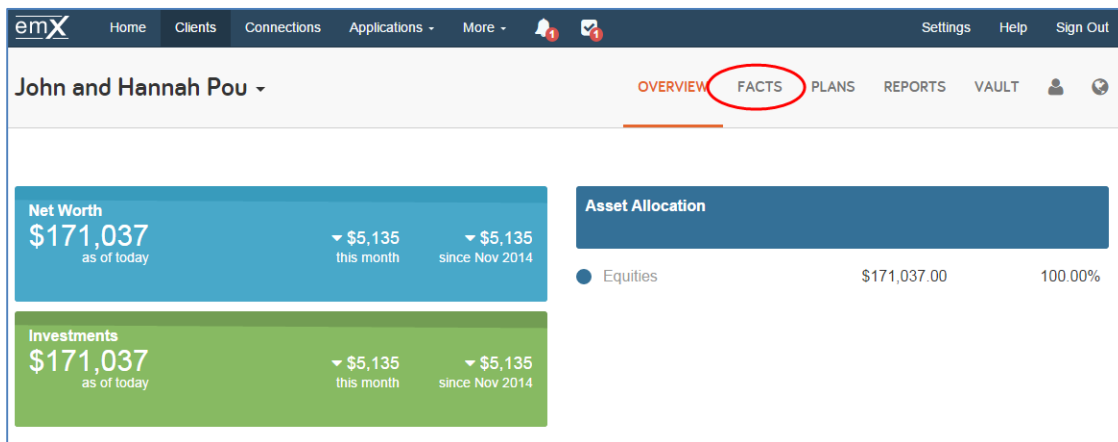
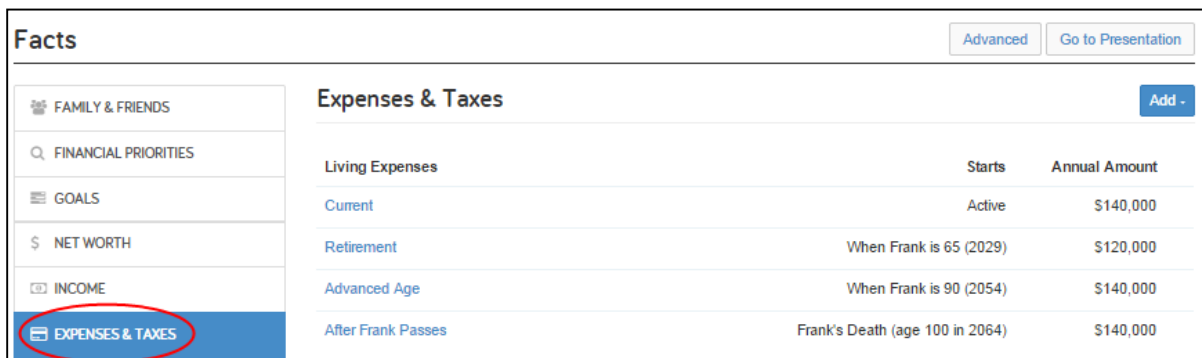


This training guide will demonstrate entering living expenses.

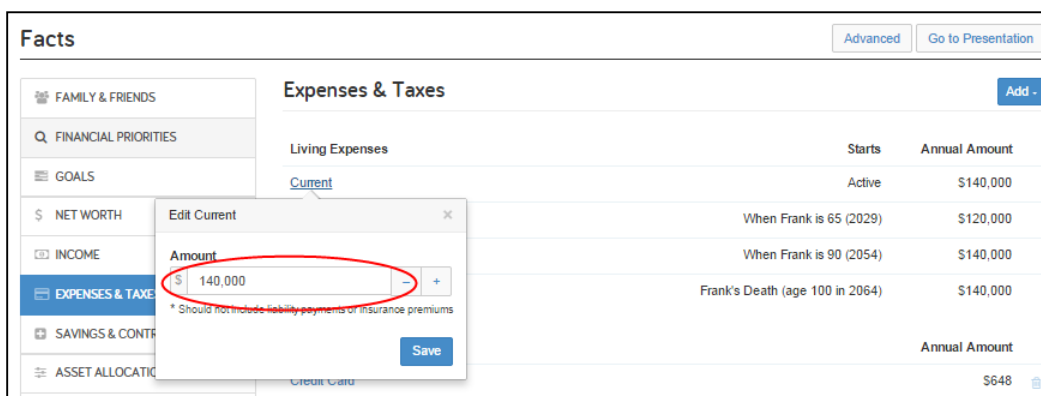
1. From the Clients tab, click **Facts**.



2. Click Expenses and Taxes to enter annual living expenses for the dynamic time periods.



3. Complete appropriate fields and click Save.



1 | Facts – Entering Living Expenses

- Click the **Worksheet** tab to create a detailed worksheet based on the client's living expenses. Click **Add an Entry** and complete the appropriate fields.

Go back to Facts

Living Expenses

Basic **Worksheet** Notes

Living expenses SHOULD NOT include mortgage, loan or other liability payments entered in the Liability section of the Fact Finder. [Click here to review EXISTING liability payments.](#)

Description	Type	Req'd	Current Amount	Semi-Retire Amount	Retire Amount	Advanced Years Amount	Custom Growth Rate
Living Expenses	Basic Expenses	<input type="checkbox"/>	\$110,000	\$110,000	\$90,000	\$80,000	
Country Club/Othe	Discretionary Sp	<input type="checkbox"/>	\$25,000	\$25,000	\$25,000	\$25,000	
Property Taxes	Property Taxes	<input type="checkbox"/>	\$23,000	\$23,000	\$23,000	\$23,000	3.00%
Medical/Health Inst	Medical Expense	<input type="checkbox"/>	\$20,000	\$20,000	\$20,000	\$20,000	4.00%
Charity	Charitable Gift	<input type="checkbox"/>	\$10,000				
Total			\$188,000	\$188,000	\$168,000	\$158,000	

Add an Entry

Cancel

Please Note: To set up defaults for the Living Expenses, refer to the "Settings – Fact Defaults" user guide.