



THE WHITE TEE WAY

INVESTING & PERSONAL FINANCE

Income & Expense Checklist

Income

- Net Monthly Salary/Hourly
- Net Monthly Overtime Wages (If applicable)
- Passive Income (e.g. Rental Income, Dividends from stock, Selling Old Items)
- Cash Gifts
- Casino Winnings
- Cashback Cash Out (e.g. Rakuten)

Expenses

- Rent/Mortgage Payment (Taxes & Insurances Included)
- Utilities (e.g. Electricity & Water)
- Car Payment
- Car Insurance
- Groceries (e.g. Food, Home Care Products)
- Home Related Items (e.g. Bathroom, Bedroom, Tools)
- Cell Phone
- Cable
- Gym Membership
- Streaming Services (e.g. Netflix and/or Hulu)
- Monthly Subscriptions (e.g. Amazon Prime)
- Dining Out (e.g. Restaurants, Fast Food, Liquor)
- Shopping
- Entertainment (e.g. Concerts, Sporting Events, Activities)
- Gifts (e.g. Birthdays, Weddings, Anniversaries)
- Savings