

BUDGET & SPENDING PLAN

BENEFICIARY:		ACCOUNT NUMBER:		
INCOME	Monthly		Annually	Notes
Supplemental Security Income (SSI)	\$		\$	
Social Security Disability Income (SSDI)	\$		\$	
Employment	\$		\$	
Retirement (SSA/Railroad) & VA Benefits	\$		\$	
Other: _____	\$		\$	
TOTAL INCOME	\$		\$	
MONTHLY EXPENSES	SSI Payments *	Paid with Trust Funds	TOTAL	Notes
Rent or Mortgage	\$		\$	
Property Taxes	\$		\$	
Homeowners Insurance	\$		\$	
Utilities (Electricity/Water/Natural Gas)	\$		\$	
Groceries (other than SNAP benefits)	\$		\$	
Eating Out	\$		\$	
Clothing		\$	\$	
Cell Phone		\$	\$	
Cable/Internet		\$	\$	
Household Items		\$	\$	
Personal Care		\$	\$	
TV/Electronics		\$	\$	
Entertainment/Hobbies		\$	\$	
Pets		\$	\$	
Transportation - Bus, Cab, etc.		\$	\$	
Car - Payment		\$	\$	
Car - Fuel		\$	\$	
Car - Insurance		\$	\$	
Car - Maintenance & Repairs		\$	\$	
Health insurance - Medicare Supplement		\$	\$	
Medical costs not paid by insurance		\$	\$	
Nursing home or assisted living facility		\$	\$	
Home care & respite care		\$	\$	
Home Modifications (Ramps & Rails)		\$	\$	
Home Repair & Upkeep		\$	\$	
Travel/Vacation		\$	\$	
Education/Training/Camp		\$	\$	
Legal		\$	\$	
Other: _____	\$	\$	\$	
TOTAL MONTHLY EXPENSES	\$	\$	\$	
ANNUAL EXPENSES TO BE PAID BY TRUST		\$		
NUMBER OF YEARS YOU PLAN FOR THE TRUST TO LAST				
AMOUNT REQUIRED TO CONTRIBUTE		\$		

* SSI provides assistance for food and shelter. "Shelter" includes: rent, mortgage payments, room, real property taxes, gas, electricity, heating fuel, water, sewerage and garbage removal. Use of trust funds to pay for these items may result in a penalty or ineligibility of benefits.

"My purpose is to give life in all its fullness" – John 10:10

The Full Life Center, Inc.

349 E. High Ave., New Philadelphia, Ohio 44663

Phone: (330) 343-0008 Fax: (330) 602-2822 Email: office@TheFullLifeCenter.org

www.thefulllifecenter.org

\$25,000 Contribution			
Low Spending		High Spending	
Initial Contribution	\$ 25,000	Initial Contribution	\$ 25,000
One Time Expenses		One Time Expenses	
Enrollment Fee	\$ (1,000)	Enrollment Fee	\$ (1,000)
Pre-Paid Funeral Expenses	\$ (5,000)	Pre-Paid Funeral Expenses	\$ (5,000)
Closing Fee	\$ (750)	Closing Fee	\$ (750)
		Car	\$ (7,000)
		Cell Phone Purchase	\$ (600)
		Computer	\$ (500)
Total One Time Expenses	\$ (6,750)	Total One Time Expenses	\$ (14,850)
Remaining Balance	\$ 18,250	Remaining Balance	\$ 10,150
Estimated Monthly Expenses		Estimated Monthly Expenses	
Transportation (Bus, Gas, Other)	\$ (50)	Car Costs (Insurance, Maintenance, Gas)	\$ (150)
Cable/Internet	\$ (75)	Cable/Internet	\$ (75)
Cell Phone Monthly Bill	\$ (50)	Cell Phone Monthly Bill	\$ (50)
Personal Items (Clothes, Care, Household)	\$ (50)	Personal Items (Clothes, Care, Household)	\$ (100)
Trust Sub-Account Fees	\$ (40)	Entertainment	\$ (50)
		Trust Sub-Account Fees	\$ (40)
Total Monthly Expenses	\$ (265)	Total Monthly Expenses	\$ (465)
Annual Expenses	\$ (3,180)	Annual Expenses	\$ (5,580)
Number of Years Until Trust Terminates	5.7	Number of Years Until Trust Terminates	1.8
Current Age of Beneficiary	38	Current Age of Beneficiary	38
Age When the Sub-Account Terminates	43.7	Age When the Sub-Account Terminates	39.8
\$75,000 Contribution			
Low Spending		High Spending	
Initial Contribution	\$ 75,000	Initial Contribution	\$ 75,000
One Time Expenses		One Time Expenses	
Enrollment Fee	\$ (1,000)	Enrollment Fee	\$ (1,000)
Pre-Paid Funeral Expenses	\$ (5,000)	Pre-Paid Funeral Expenses	\$ (5,000)
Closing Fee	\$ (750)	Closing Fee	\$ (750)
		Car	\$ (7,000)
		Cell Phone Purchase	\$ (600)
		Computer	\$ (500)
Total One Time Expenses	\$ (6,750)	Total One Time Expenses	\$ (14,850)
Remaining Balance	\$ 68,250	Remaining Balance	\$ 60,150
Estimated Monthly Expenses		Estimated Monthly Expenses	
Transportation (Bus, Gas, Other)	\$ (50)	Car Costs (Insurance, Maintenance, Gas)	\$ (150)
Cable/Internet	\$ (75)	Cable/Internet	\$ (75)
Cell Phone Monthly Bill	\$ (50)	Cell Phone Monthly Bill	\$ (50)
Personal Items (Clothes, Care, Household)	\$ (50)	Personal Items (Clothes, Care, Household)	\$ (100)
Trust Sub-Account Fees	\$ (77)	Entertainment	\$ (50)
		Trust Sub-Account Fees	\$ (77)
Total Monthly Expenses	\$ (302)	Total Monthly Expenses	\$ (502)
Annual Expenses	\$ (3,624)	Annual Expenses	\$ (6,024)
Number of Years Until Trust Terminates	18.8	Number of Years Until Trust Terminates	9.9
Current Age of Beneficiary	38	Current Age of Beneficiary	38
Age When the Sub-Account Terminates	56.8	Age When the Sub-Account Terminates	47.9

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