

**Wiser Wealth Management, Inc.**

[www.wiserinvestor.com](http://www.wiserinvestor.com)

**Client Name:** \_\_\_\_\_

**Income**

LTD: \_\_\_\_\_

Quixtar.com: \_\_\_\_\_

**Expenses**

**LTD (Tools)**

Registration \_\_\_\_\_

Web Office \_\_\_\_\_

CEP (continuing education) \_\_\_\_\_

Communicate (voicemail) \_\_\_\_\_

Additional tools, Personal education \_\_\_\_\_

Additional tools, handout to prospects/new IBO's \_\_\_\_\_

**Quixtar.com (Products)**

Registration \_\_\_\_\_

Renewal \_\_\_\_\_

Purchases (other than ongoing personal use) \_\_\_\_\_

Purchases – Samples \_\_\_\_\_

## General Expenses

Function tickets \_\_\_\_\_

Business gifts \_\_\_\_\_

Charitable contributions (cash) \_\_\_\_\_

Charitable contributions (products at cost) \_\_\_\_\_

Travel, Hotel \_\_\_\_\_

Travel, Auto rental \_\_\_\_\_

Travel, Airfare \_\_\_\_\_

Travel, other – taxi fares, tips, parking, etc \_\_\_\_\_

Meals/Entertainment \_\_\_\_\_

Office Supplies \_\_\_\_\_

Promotions/Advertising \_\_\_\_\_

Postage \_\_\_\_\_

Business use cell phone \_\_\_\_\_

Purchase of assets (computers, printers, furniture, etc.) used for business - Please enter on asset sheet in general organizer.

Office in home - Please enter on home office sheet in general organizer.

Auto expenses – Please enter on auto expense sheet in general organizer including mileage (both business and personal)

Any additional business expenses not listed above:

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