

Anne Wolfe Trust Annual Expenditure Totals by Category

updated: 3/26/2022

	Trust Exp.	Expenses					Live life now!		Sub-total:
	Trust	Prop. Tax	Insurance	Medical	Condo	Car	Travel	Anne	
2018 Totals:	\$7,367 43.4%	\$2,128 12.5%	\$842 5.0%	\$545 3.2%	\$3,469 20.5%	\$2,000 11.8%	\$0 0.0%	\$609 3.6%	\$16,960
2019 Totals:	\$10,666 54.7%	\$2,093 10.7%	\$994 5.1%	\$224 1.1%	\$4,041 20.7%	\$0 0.0%	\$687 3.5%	\$803 4.1%	\$19,508
2020 Totals:	\$5,780 15.6%	\$3,123 8.4%	\$1,710 4.6%	\$436 1.2%	\$3,193 8.6%	\$22,326 60.2%	\$0 0.0%	\$537 1.4%	\$37,105 **
2021 Totals:	\$3,849 23.3%	\$2,167 13.1%	\$1,061 6.4%	\$3,057 18.5%	\$3,178 19.3%	\$0 0.0%	\$2,523 15.3%	\$670 4.1%	\$16,504
Totals:	\$27,662 30.7%	\$9,511 10.6%	\$4,607 5.1%	\$4,262 4.7%	\$13,881 15.4%	\$24,326 27.0%	\$3,210 3.6%	\$2,619 2.9%	\$90,077

2018 Summary:	Trust exp:	\$7,367	43.4%
	Expenses:	\$8,984	53.0%
	Live now:	\$609	3.6%

2019 Summary:	Trust exp:	\$10,666	54.7%
	Expenses:	\$7,352	37.7%
	Live now:	\$1,490	7.6%

2020 Summary:	Trust exp:	\$5,780	15.6%
	Expenses:	\$30,788	83.0%
	Live now:	\$537	1.4%

2021 Summary:	Trust exp:	\$3,849	23.3%
	Expenses:	\$9,463	57.3%
	Live now:	\$3,193	19.3%

Totals Summary:	Trust exp:	\$27,662	30.7%
	Expenses:	\$56,587	62.8%
	Live now:	\$5,829	6.5%

Exp. + Live now total: \$62,415 (no Trust)

Exp. + Live now ave / yr: \$15,604 (income)

Exp. + Live now ave/yr*: \$9,522 (income)

* Less Ford EcoSport purchase expense.

** 2018 Ford EcoSport purchased in 2020.
This replaced a 1998 Toyota Corolla.

Grand Total: \$90,077 Average spending / year: \$22,519 Trust %: 1.75% /year
Average spending / year less EcoSport: \$16,938 Trust %: 1.31% /year

per year:
Hal's Proposal: \$6,000 budget for personal spending \$500.00 / month \$21,381 actual 4 year delta
(for more "Live" \$) \$12,000 budget for travel spending \$44,790 actual 4 year delta
\$66,171 Total incremental over 4 yrs

Spending totals if the proposed spending had occurred in the past 4 years:

Totals:	\$27,662 17.7%	\$9,511 6.1%	\$4,607 2.9%	\$4,262 2.7%	\$13,881 8.9%	\$24,326 15.6%	\$48,000 30.7%	\$24,000 15.4%	\$156,248
----------------	-------------------	-----------------	-----------------	-----------------	------------------	-------------------	-------------------	-------------------	-----------

Spending Delta total: \$66,171

Spending Delta per year: \$16,543

Totals Summary:	Trust:	\$27,662	17.7%
	Expenses:	\$56,587	36.2%
	Live now:	\$72,000	46.1%

~Trust value now: \$1,288,440 Proposed spending delta Trust %: 1.28%
~Trust value with proposed spending: \$1,222,269 Total curret spending % / yr: 1.75%
Trust % spending change w / proposal: 5.1% **Total w/proposed spending % / yr: 3.0%**
"Live now" spend change % w/proposal: **1135%**

< (The 4% spend rule is well known to retirees.
Seemingly not to the current Trustees.)

\$20 grand Total / year: 3.2%

Summary: With a shift of 5% of the Trust's overall value, the level of resources to enhance Anne's life would have gone up by over 1000%. Incredible.