



Subscription Audit Worksheet

How to streamline your subscription spending



With a wealth of subscription services available for seemingly everything under the sun, it's easy to see how free trials and subscription services can start to add up. That's why it's important to take the time to evaluate your subscriptions and see what you're paying for, how you're using it, and whether it's truly something you need. By doing so, you may be able to make room in your budget for other expenses — or your savings.

1.

Start by logging in to your bank accounts to see all the regular charges that occur. Then, plot them out in one of the four categories in this worksheet: Streaming/TV Services, Phone Apps, Memberships, and Delivery Services/Boxes. List each service under the **My Services** column and enter your current monthly cost for each in the second column, labeled **Current Price**.

Now, here's where it gets interesting. Once you have all your subscriptions listed out with their monthly cost, it's time to ask yourself what you'll do with the subscription: Do you want to keep it as is, lower the monthly cost by switching to a lower tier, or cancel it altogether?

2.

3. □

Once you've made your decision, fill in the cost in the appropriate category based on what you decided to do with it. If you cancel the service, put an X in the **Cancel** column and enter \$0 in the New Price column. If you keep the service with no changes, put an X in the **Keep** column and just copy the current price into the **New Price** column. And if you decide to lower your subscription tier — say, moving from ad-free Hulu to a subscription with ads — place an X in the **Adjust** column and write the reduced price in the **New Price** column. After completing each category, you can add up the numbers in the **New Price** column to see what you'll be paying in subscriptions after your changes. If you want to see how much you saved, you can total the **Current Price** column and subtract the new price from that number.

Once you decide to cancel a service, **make sure you make the changes** in the service provider's portal and that it's reflected in your next month's expenses. It might take a bit, but it's better to do it yourself vs. pay for someone (like TrueBill/Rocket Money) to do it for you.



Ready to get started? Let's do this.



Streaming/TV Services:

Popular examples include Netflix, Hulu + Live, YouTube TV™, Apple TV+®, Peacock, Disney+®, Paramount+, Prime Video, HBO Max™, Showtime®, Starz Encore®, Vudu, NFL Network, etc.

My Services	Current Price	Cancel	Keep	Adjust	New Price

Amount saved from TV streaming adjustments/cancellations: _____



Music:

Popular examples include Spotify®, Pandora, Apple Music®, Tidal, Amazon Music, Qobuz, Sirius XM, Deezer, YouTube Music, iHeartRadio, etc.

My Services	Current Price	Cancel	Keep	Adjust	New Price

Amount saved from music streaming adjustments/cancellations: _____



Delivery Services/Boxes:

Popular examples include Instacart®, DoorDash®, GrubHub, Chewy®, BarkBox™, HelloFresh®, Blue Apron, EveryPlate®, Freshly, Hungryroot™, ButcherBox, Dinnerly™, Purple Carrot, Gobble, FabFitFun, Breo Box, Hunt a Killer, KnitCrate, Bespoke Post™, Scentbird, MeUndies, Short Story Box, Burst Oral Care, Sips By®, Silk + Sonder, Toy Box Monthly, Loot Crate™, Book of the Month®, Winc, Elephant Books, Atlas Coffee Club™, etc.

My Services	Current Price	Cancel	Keep	Adjust	New Price

Amount saved from delivery service/box adjustment/cancellations: _____



Memberships:

Popular examples include gyms, car washes, Canva, Wix, Amazon Prime, gaming services, ebooks, credit and identity theft monitoring, online newspaper/magazine subscriptions, cloud storage, tanning, massages — if you don't know where else to put something, put it here.

My Services	Current Price	Cancel	Keep	Adjust	New Price

Amount saved from membership adjustments/cancellations:



Phone Apps:

To find your phone subscriptions on an iPhone, go to Settings, tap your Apple ID at the top, then tap Subscriptions in the fourth line down. Android users, go to Google Play™, click your profile icon, select Payments and Subscriptions, then open the Subscriptions tab.

My Services	Current Price	Cancel	Keep	Adjust	New Price

Amount saved from phone apps adjustments/cancellations:



Hopefully, this exercise will help you identify some easy ways to lower your monthly costs, which is a great way to increase the amount you contribute to your savings each month, or even to your company's retirement plan, if you have one through work. For other helpful money tips, check out our Learning Center at ubt.com/learn or talk to one of our friendly bankers.