

LIFE INSURANCE

MONTHLY EXPENSE FACT FINDER

Long-term Expense		
	Amount owed	Monthly Payment
Mortgage/Rent	\$ _____	\$ _____
Automobile Loans	\$ _____	\$ _____
Credit Cards	\$ _____	\$ _____
College Loans	\$ _____	\$ _____
Other loans	\$ _____	\$ _____
Other loans	\$ _____	\$ _____
Total Long-term Expense	\$ _____	\$ _____

General Monthly Expenses	
	Monthly Payment
Cable/Internet/Phones	\$ _____
Utilities	\$ _____
Insurance (auto, home, life, disability)	\$ _____
Water	\$ _____
Trash	\$ _____
Daycare/Schooling	\$ _____
Alimony/Child Support	\$ _____
Household Maintenance (lawn care, exterminator)	\$ _____
Fuel (auto, propane, etc.)	\$ _____
Groceries	\$ _____
Clothing	\$ _____
Medical Costs (prescriptions, co-pays, etc.)	\$ _____
Pet care	\$ _____
Membership/Association fees (gym, HOA, etc.)	\$ _____
Miscellaneous	\$ _____
Total General Expenses	\$ _____

Not FDIC/NCUA insured • May lose value • Not bank/CU guaranteed
 Not a deposit • Not insured by any federal agency



Monthly Savings**Monthly Amount Saved**

Retirement (401(k), 403(b), IRA, etc.)

\$

College

\$

Bank savings (short-term)

\$

Stocks and bonds

\$

Total Amount Saved Monthly

\$

Total Monthly Expenses

\$

Total Monthly Income Spouse A

\$

Total Monthly Income Spouse B

\$

Total Monthly Income from Other Sources

\$

Total Monthly Income

\$

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LONG-TERM SMART®