

Monthly Fixed Expenses Worksheet

Expense	Amount
Mortgage / rent	
Home-equity loans	
Car loan(s)	
Taxes	
Life Insurance	
Long Term Care Insurance	
Auto Insurance	
Homeowners Insurance	
Health Insurance	
Heating	
Electricity	
Telephone	
Water and sewer	
Automobile	
Clothing	
Food and beverages	
Medical / dental	
Charity	
Emergency fund	
College fund	
Travel fund	
Miscellaneous	
Total Fixed Expenses	
Subtract Social Security Check	
Net Monthly Fixed Expenses	

Now call your Financial Advisor for a quote for an Immediate Income Annuity that will provide a guaranteed monthly paycheck equal to your Net Monthly Fixed Expenses.

With your fixed expenses covered on a Guaranteed basis you are now able to invest your remaining nest egg with peace of mind in any way that suits you.