

Financial Statement for Indexed Universal Life (IUL) Investment

Safeway Insurance Agency - 2309 W Main St Norman, OK 73069

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Name _____ DOB _____ Sex ___ Tobacco Use Yes ___ No ___
 Phone _____ Email _____

	Monthly	Annually
Rent	\$	
Mortgage or Contract for Deed Payment and Real estate taxes		
Homeowner's Insurance		
Utilities (electricity, telephones, cable, water, garbage, etc.)		
Heat (gas)		
Food (groceries and school meals)		
Clothing		
Laundry and dry cleaning		
Medical and dental expenses		
Transportation (gas, bus, taxi, other)		
Car insurance and repairs		
Recreation, entertainment, dining out, travel, etc.		
Newspapers & magazines		
Social & faith-based obligations		
Personal Incidentals (toiletries, haircuts, etc.)		
Child care		
Home maintenance and repairs		
Children's school needs (uniforms, supplies, activities)		
Monthly debt payments:		
Other:		
Other:		
MONTHLY TOTAL:	\$	

Monthly household Income from all sources \$ _____

Subtract total household income form monthly expanses \$ _____

Monthly amount for IUL investment \$ _____