Life Insurance Needs

Prepared By:

Date:

1 Client Information

Client _____   Spouse/Partner _____

DOB _____   DOB _____

2 Lump Sum Needs

Client		**Spouse/Partner**	
Mortgage Balance	$ _____	Mortgage Balance	$ _____
Line of Credit	$ _____	Line of Credit	$ _____
Loans and Credit Cards	$ _____	Loans and Credit Cards	$ _____
Children's Education	$ _____	Children's Education	$ _____
Final Expenses	$ _____	Final Expenses	$ _____
Other	$ _____	Other	$ _____

3 Monthly Income Needs

Client		**Spouse/Partner**	
Lifestyle Income	$ _____	Lifestyle Income	$ _____
No. of Years	_____	No. of Years	_____
Child Dependency Income	$ _____	Child Dependency Income	$ _____
No. of Years	_____	No. of Years	_____
Investment Rate of Return	$ _____	Investment Rate of Return	$ _____
Rate of Inflation	$ _____	Rate of Inflation	$ _____

Life Insurance Needs

Client

Creditor Life $ _____

Group Life $ _____

Individual Life $ _____

Liquid
Investments $ _____

Spouse/Partner

Creditor Life $ _____

Group Life $ _____

Individual Life $ _____

Liquid
Investments $ _____