

# Life Insurance Needs

Prepared By:

Date:

## 1 Client Information

Client \_\_\_\_\_ Spouse/Partner \_\_\_\_\_  
DOB \_\_\_\_\_ DOB \_\_\_\_\_

## 2 Lump Sum Needs

### Client

Mortgage Balance \$ \_\_\_\_\_  
Line of Credit \$ \_\_\_\_\_  
Loans and Credit Cards \$ \_\_\_\_\_  
Children's Education \$ \_\_\_\_\_  
Final Expenses \$ \_\_\_\_\_  
Other \$ \_\_\_\_\_

### Spouse/Partner

Mortgage Balance \$ \_\_\_\_\_  
Line of Credit \$ \_\_\_\_\_  
Loans and Credit Cards \$ \_\_\_\_\_  
Children's Education \$ \_\_\_\_\_  
Final Expenses \$ \_\_\_\_\_  
Other \$ \_\_\_\_\_

## 3 Monthly Income Needs

### Client

Lifestyle Income \$ \_\_\_\_\_  
No. of Years \_\_\_\_\_  
Child Dependency Income \$ \_\_\_\_\_  
No. of Years \_\_\_\_\_  
Investment Rate of Return \$ \_\_\_\_\_  
Rate of Inflation \$ \_\_\_\_\_

### Spouse/Partner

Lifestyle Income \$ \_\_\_\_\_  
No. of Years \_\_\_\_\_  
Child Dependency Income \$ \_\_\_\_\_  
No. of Years \_\_\_\_\_  
Investment Rate of Return \$ \_\_\_\_\_  
Rate of Inflation \$ \_\_\_\_\_

# Life Insurance Needs

## 4 Insurance

### Client

Creditor Life \$ \_\_\_\_\_

Group Life \$ \_\_\_\_\_

Individual Life \$ \_\_\_\_\_

Liquid Investments \$ \_\_\_\_\_

### Spouse/Partner

Creditor Life \$ \_\_\_\_\_

Group Life \$ \_\_\_\_\_

Individual Life \$ \_\_\_\_\_

Liquid Investments \$ \_\_\_\_\_