

Name(s): _____ Age(s): _____
 Married/Single: _____ #Kids (ages): _____
 Work: _____ How Long: _____

What are the biggest concerns that I can help you solve today?

YOUR GOALS:

Short Term	Long Term	Retirement
		Income needed: Desired age: Retirement Plan:

Peace= Plan in place **Security=** Lifetime Income **Freedom=** Live the Life you Desire
 If we can provide these 3 things within your budget, can we start today? _____

Financial Overview: Die too Early, Become Ill, Live too Long

Life Insurance: _____	Current Retirement: _____
Living Benefits: _____	Saving Plan: _____
Healthcare: _____	Final Wishes: _____

D - Debt _____
I - Income _____
M - Mortgage _____
E - Education _____
Protection Needed _____

PERSONAL PLAN:

HEALTHCARE	FINAL WISHES	TERM/ LB'S	IUL
Package Plan	Cremation/ Burial	Protection Needed	Income Needed
\$: _____	\$ _____	\$: _____	\$ _____
Package Premium	Save	Term: _____ years	Save
\$: _____	\$ _____	\$: _____	\$ _____

