

Agent: _____

Date: _____

Client Worksheet

Client Information

Client's Name	Age	Spouse's Name	Age
\$		\$	
Monthly Income / Income Sources		Monthly Income / Income Sources	
1)	<div style="border: 1px solid black; width: 100px; height: 30px; margin: 0 auto;"></div>	1)	
2)		2)	
Total Income			

Mortgage Information

\$		\$	\$	\$	Y / N
Mortgage Balance	Years Left	Mortgage Payment	Value	Equity	Both On Mortgage

My goal is to protect this loan 10% to 100%, even if it's only \$10,000 and put Tax Free \$\$ in the hands for your loved ones.

Would loss of either person's income make monthly mortgage payments difficult or impact either person? Y / N

Are you doing anything to aggressively pay the mortgage off early now? Y / N If NO, would you like to? Y / N

Medical Information

	Y / N		Y / N
Medication / Dosage / Frequency	Hospitalized 2 Yrs	Medication / Dosage / Frequency	Hospitalized 2 Yrs
Medication / Dosage / Frequency		Medication / Dosage / Frequency	
Notes:	<div style="border: 1px solid black; width: 350px; height: 30px;"></div>	Notes:	<div style="border: 1px solid black; width: 350px; height: 30px;"></div>

Current Life Insurance

Does client(s) have full understanding of types of Life Insurance? Y / N

	<div style="border: 1px solid black; width: 60px; height: 20px;"></div>		<div style="border: 1px solid black; width: 60px; height: 20px;"></div>
Company / Amount / Account#	Inc Repl Yrs.	Company / Amount / Account#	Inc Repl Yrs.
Anything Else That Acts Like Life Insurance? Y / N		Anything Else That Acts Like Life Insurance? Y / N	
Notes:	<div style="border: 1px solid black; width: 350px; height: 30px;"></div>	Notes:	<div style="border: 1px solid black; width: 350px; height: 30px;"></div>

(401K / Annuity / TSP / CD / Savings) **If YES, Possible Annuity. If NO, possible Indexed Universal Life Policy.**

Some rely on "Income Replacement" Insurance to cover the Mortgage, Debts and Income. We are glad that's what you don't want to.

Protection Options

1)	1)
2)	2)
3)	3)

From a budget & Protection standpoint, which option will work for you?