

# FINANCIAL GAME PLAN / INPUT SHEET

First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
 DOB \_\_\_/\_\_\_/\_\_\_ Age \_\_\_\_\_ Tobacco? Y/N Home# \_\_\_\_\_ Cell Ph # \_\_\_\_\_  
 Spouse's Name \_\_\_\_\_ Last Name \_\_\_\_\_  
 DOB \_\_\_/\_\_\_/\_\_\_ Age \_\_\_\_\_ Tobacco? Y/N Home# \_\_\_\_\_ Cell Ph # \_\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Pri Email \_\_\_\_\_ Sp Email \_\_\_\_\_

## Protection Income Number (PIN)

**Experts recommend 8-10 times the amount of your annual salary in life insurance to protect/replace your income.**

*Example: \$4,000/mth x 12 = \$48,000 x 10 = \$480,000 (\$480,000 x 10% = \$48,000 / 12 = \$4,000 mth)*

**When a family like yours doesn't have any life insurance outside of work, or is underinsured, it's usually due to one of the following reasons:**

**A.** They didn't understand it. **B.** They didn't think they could afford it. **C.** They never got around to it.

### How much life insurance coverage do you have now? What kind is it, Whole Life or Term?

**Primary:** Whole Life - face amount \$ \_\_\_\_\_ monthly premium \$ \_\_\_\_\_ cash value \$ \_\_\_\_\_  
 Term - face amount \$ \_\_\_\_\_ monthly premium \$ \_\_\_\_\_ term length \_\_\_\_\_  
**Spouse:** Whole Life - face amount \$ \_\_\_\_\_ monthly premium \$ \_\_\_\_\_ cash value \$ \_\_\_\_\_  
 Term - face amount \$ \_\_\_\_\_ monthly premium \$ \_\_\_\_\_ term length \_\_\_\_\_  
**Children:** face amount \$ \_\_\_\_\_ type: \_\_\_\_\_ (WL/Term) monthly premium \$ \_\_\_\_\_ cash value \$ \_\_\_\_\_

### HOW MUCH IS ENOUGH?

	PRIMARY	SPOUSE
<b>D DEATH &amp; DEBT</b>		
If you died today, how much will it take to cover your Funeral Expenses?	\$ _____	\$ _____
Any joint debt that needs to be paid off?	\$ _____	\$ _____
<b>I INCOME</b>		
If you died today, how much of your monthly income will your family need to maintain their standard of living?		
Primary: \$ _____ X 12 months = \$ _____ x 10 =	\$ _____	
Spouse: \$ _____ X 12 months = \$ _____ x 10 =		\$ _____
<b>M MORTGAGE</b>		
If you died today would you want your mortgage paid off? _____ (Y/N)		
How much to pay off?	\$ _____	\$ _____
<b>E EDUCATION</b>		
Annual cost to send your child to college? \$ _____ <i>public (\$20k to \$35k a year) private (\$35k &amp; up a year)</i>		
Number children to put through college? _____		
annual cost \$ _____ x # children _____ x 4 years =	\$ _____	\$ _____
<b>SUB-TOTAL NEEDED</b>	<b>\$ _____</b>	<b>\$ _____</b>
LESS ASSETS (401K/403B/TSP/etc)	- \$ _____	- \$ _____
<b>TOTAL NEEDED</b>	<b>\$ _____</b>	<b>\$ _____</b>

Primary: How often do you get paid? \_\_\_\_\_ Wkly / Bi-Wkly / Bi-Mtly / Mtly Amt Willing to set aside For FI \$ \_\_\_\_\_  
 Spouse: How often do you get paid? \_\_\_\_\_ Wkly / Bi-Wkly / Bi-Mtly / Mtly Amt Willing to set aside For FI \$ \_\_\_\_\_

What's a good day to get back together to help you implement your plan? Day \_\_\_\_\_ Time \_\_\_\_\_

Do you have a problem with a professional coming to your home to complete blood and urine? \_\_\_\_\_ (YES/NO)

We work off referrals, will you refer my services to your friends and family? \_\_\_\_\_ (YES/NO)