

# FINANCIAL GAME PLAN / INPUT SHEET

First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
 DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Age \_\_\_\_\_ Tobacco? Y/N Cell# \_\_\_\_\_ Do you have a WILL? \_\_\_\_\_  
 Spouse's Name \_\_\_\_\_ Last Name \_\_\_\_\_  
 DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Age \_\_\_\_\_ Tobacco? Y/N Cell# \_\_\_\_\_ Do you have a WILL? \_\_\_\_\_  
 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: \$5,000/mth x 12 = \$60,000 x 10 = \$600,000 (\$600,000 x 10% = \$60,000 / 12 = \$5,000 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:** WL/Term: \_\_\_\_\_ face amount \$ \_\_\_\_\_ monthly premium \$ \_\_\_\_\_ cash value \$ \_\_\_\_\_

Family  
Total Coverage

Family  
Total Premium

Additional Notes

## HOW MUCH IS ENOUGH?

**D**

### DEATH & DEBT

If you died today, how much will it take to cover your Funeral Expenses? \$ \_\_\_\_\_

Any joint debt that needs to be paid off? \$ \_\_\_\_\_

PRIMARY

SPOUSE

**I**

### INCOME

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 = \$ \_\_\_\_\_

**M**

### MORTGAGE

If you died today would you want your mortgage paid off? \_\_\_\_\_ (Y/N)

How much to pay off? \$ \_\_\_\_\_

**E**

### EDUCATION

Annual cost to send your child to college? \$ \_\_\_\_\_

public (\$20k to \$35k a year) private (\$35k & up a year)

Number children to put through college? \_\_\_\_\_

At an annual cost of \$ \_\_\_\_\_ a year x 4 years = \$ \_\_\_\_\_

### SUB-TOTAL NEEDED

LESS ASSETS (401K/403B/TSP/etc) - \$ \_\_\_\_\_

### TOTAL NEEDED

\$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 - \$ \_\_\_\_\_  
 \$ \_\_\_\_\_

FIN#

PRIMARY

SPOUSE

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 \$ \_\_\_\_\_

Based on what we've discussed thus far, is there any reason you wouldn't do business with us/me?

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

Our "fee for service" is referrals, not \$\$, will you refer my services to your friends and family? \_\_\_\_\_ (YES/NO)

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