

LIFE INSURANCE NEEDS SUMMARY

This Life Insurance Needs Summary can be used to record the life insurance needs for 1 or 2 individuals. Once you have completed a needs analysis discussion with a client, you can enter the client's current life insurance needs in the applicable fields below, after deducting any existing life insurance and/or net liquid assets that would be used to cover those needs.

Mortgage, Debt and Living Expenses	Life Insured 1	Life Insured 2
How much life insurance do you need to cover your mortgage, other debts and/or future rent payments?	\$	\$
How much life insurance do you need to cover your annual income for _____ years?	\$	\$
Subtotal	\$	\$
Children Dependency		
How much life insurance do you need to cover your children's education costs?	\$	\$
How much life insurance do you need to cover your childcare expenses?	\$	\$
Subtotal	\$	\$
Final Expenses		
How much life insurance do you need to cover final expenses?	\$	\$
Current Life Insurance Need	\$	\$

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