



Name \_\_\_\_\_  
 Ph # \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_

## SIMPLE NEEDS ANALYSIS

	Client	Spouse
NAME		
Date of Birth		
Tobacco Use (Cigarettes, Cigars, Gum, Patch, etc)		
Height		
Weight		
Do you have any Medical Issues?		
Are you taking any Prescription Medications		

<b>LOANS</b> - Total Debt ( CC, Student/ Personal Loans)		
<b>FINAL EXPENSE</b> - Recommended \$15,000		
<b>MORTGAGE/RENT</b> - Total Balance or Rent for 5 Years		
<b>EDUCATION</b> - Recommended \$100,000 Per Child		
<b>INCOME</b> - Income Replacement for 5 Years		
<b>TOTAL LIFE INSURANCE NEED</b>		

### RETIREMENT FUNDING SOURCES

Stocks, Bonds, Mutual Funds, etc.		
Current Life Insurance Premium		
Current IRA's, Roth IRA's, 401K's, 403B's, etc.		
How much are you currently saving		
How much can you commit monthly for Retirement?		
<b>TOTAL MONTHLY SAVINGS</b>		

### OPTIONAL FUNDS TO REPOSITION

Qualified Retirement Funds (401K, 403B, SEP, etc.)		
Non-Retirement Funds (Savings, MM, CD's, etc.)		
College Funds (529 Plans, UTIMA, etc.)		
Cash Value Balance in Current Life Insurance Policies		
<b>TOTAL FUNDS</b>		

