

Life Insurance Needs Form

	Client	Spouse
Final Expenses <i>Funeral, hospital, lawyer, etc.</i>	\$ _____	\$ _____
Debt <i>Mortgage, credit card, auto loan, etc.</i>	\$ _____	\$ _____
Education <i>For children or spouse</i>	\$ _____	\$ _____
Income <i>Annual income you wish to provide survivors x number of years of need</i>	\$ _____	\$ _____
Special <i>Child's wedding, dream vacation for surviving family, etc.</i>	\$ _____	\$ _____
Total	\$ _____	\$ _____
(Minus current coverage)	\$ _____	\$ _____
Total need	\$ _____	\$ _____