



## CLIENT INFORMATION

NAME: \_\_\_\_\_

GENDER: \_\_\_\_\_ DOB: \_\_\_\_\_

UNDERWRITING RISK CLAS: \* \_\_\_\_\_

RETIREMENT AGE: \_\_\_\_\_

INFLATION RATE (USED TO INDEX INCOME STREAMS): \_\_\_\_\_%

## INCOME REPLACEMENT

AFTER-TAX INSURANCE INVESTMENT RATE  
(FOR PRESENT VALUE CALCULATION: \_\_\_\_\_)%

TAX BRACKET: \_\_\_\_\_

SALARY TO REPLACE: \$ \_\_\_\_\_

YEARS TO REPLACE SCENARIO: \_\_\_\_\_

INDEX FOR INFLATION: \_\_\_\_\_  YES  NO

## OTHER NOTES:

Empty text area for other notes.

## ESTATE ADMINISTRATION

FUNERAL/BURIAL NEEDS: \$ \_\_\_\_\_

PROBATE: \$ \_\_\_\_\_

OTHER EXPENSES: \$ \_\_\_\_\_

EXISTING LIFE INSURANCE: \$ \_\_\_\_\_

EXISTING ASSET SET ASIDE FOR NEEDS AT DEATH: \$ \_\_\_\_\_

## OTHER NEEDS AT DEATH

CHILD CARE PER YEAR: \$ \_\_\_\_\_ YEARS TO REPLACE: \_\_\_\_\_

SHORT-TERM DEBT (LOANS, CREDIT CARDS): \$ \_\_\_\_\_

OTHER DEBT (MORTGAGE, HOME LOANS): \$ \_\_\_\_\_

OTHER EXPENSES (EMERGENCY FUNDS, GIFTS): \$ \_\_\_\_\_

COLLEGE FUND AMOUNT:  LUMP SUM: \$ \_\_\_\_\_ OR

SCHEDULE: \$ \_\_\_\_\_

% TO COVER: \_\_\_\_\_

PRODUCT: \_\_\_\_\_  UL  VUL  OTHER: \_\_\_\_\_

### \*UNDERWRITING RISK CLASS:

- Super Preferred Non Smoker
- Preferred Non Smoker
- Standard Plus Non Smoker
- Standard Non Smoker
- Preferred Smoker
- Standard Smoker
- Uninsurable



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