



Agent: \_\_\_\_\_

Date: \_\_\_\_\_

**Client Worksheet**

**Client Information**

Client's Name	Age	Spouse's Name	Age
\$ _____		\$ _____	
Monthly Income / Income Sources		Monthly Income / Income Sources	
1) _____	Total Income	1) _____	
2) _____		2) _____	

**Mortgage Information**

\$ _____	_____	\$ _____	\$ _____	\$ _____	Y / N
Mortgage Balance	Years Left	Mortgage Payment	Value	Equity	Both On Mortgage

**My goal is to protect this loan 10% to 100%, even if it's only \$10,000 and put Tax Free \$\$ in the hands for your loved ones.**

Would loss of either person's income make monthly mortgage payments difficult or impact either person? Y / N

Are you doing anything to aggressively pay the mortgage off early now? Y / N      If NO, would you like to? Y / N

**Medical Information**

_____	Y / N	_____	Y / N
Medication / Dosage / Frequency	Hospitalized 2 Yrs	Medication / Dosage / Frequency	Hospitalized 2 Yrs
_____		_____	
Medication / Dosage / Frequency		Medication / Dosage / Frequency	
Notes: <input style="width: 400px; height: 30px;" type="text"/>		Notes: <input style="width: 400px; height: 30px;" type="text"/>	

**Current Life Insurance**

Does client(s) have full understanding of types of Life Insurance? Y / N

_____	<input style="width: 60px; height: 25px;" type="text"/>	_____	<input style="width: 60px; height: 25px;" type="text"/>
Company / Amount / Account#	Inc Repl Yrs.	Company / Amount / Account#	Inc Repl Yrs.
Anything Else That Acts Like Life Insurance? Y / N		Anything Else That Acts Like Life Insurance? Y / N	
Notes: <input style="width: 400px; height: 30px;" type="text"/>		Notes: <input style="width: 400px; height: 30px;" type="text"/>	

(Med Sup / 401K / Annuity / TSP / CD / Savings) **If YES, Possible Annuity/Med Sup. If NO, possible Indexed Universal Life Policy.**

Some rely on "Income Replacement" Insurance to cover the Mortgage, Debts and Income. We are glad that's what you don't want to.

**Protection Options**

1) _____	1) _____
2) _____	2) _____
3) _____	3) _____

From a budget & Protection standpoint, which option will work for you?