



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:       Notes:

*Heart Attack / Stroke / TIA / Stents / Cancer / Diabetes (Pills vs Insulin) / Pain Meds / HBP / Cholesterol Asthma & COPD (Albuterol vs Corticosteroid) / Thyroid / Anxiety & Depression / Alzheimers / Dementia*

**Current Life Insurance**

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

Company / Amount / Account#		Company / Amount / Account#	
	Inc Repl Yrs.		Inc Repl Yrs.
Anything Else That Acts Like Life Insurance? Y / N		Anything Else That Acts Like Life Insurance? Y / N	
Notes: <span style="border: 1px solid black; display: inline-block; width: 300px; height: 30px; vertical-align: middle;"></span>		Notes: <span style="border: 1px solid black; display: inline-block; width: 300px; height: 30px; vertical-align: middle;"></span>	

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

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

**Identity theft is the #1 consumer crime in the United States. Are you protected?**

