

Quick Life Insurance Needs Snapshot

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A 1-page pre-appointment form to help estimate your coverage needs. Estimates are perfectly fine.

CONTACT

Name

Phone

Email

Age

HOUSEHOLD

Spouse/partner?

☐ Yes☐ No

Dependent children / ages

FINANCIAL SNAPSHOT

Annual income

\$

Years of income to replace

Mortgage balance

\$

Other debts

\$

Final expenses / emergency fund

\$

Education goal

\$

Existing life insurance

\$

Available savings/assets

\$

WHAT DO YOU WANT YOUR COVERAGE TO DO?

☐ Replace income

☐ Pay off mortgage

☐ Pay debts

☐ Final expenses

☐ Education

☐ Leave a legacy

☐ Protect a business

SELF-EMPLOYED / BUSINESS OWNER (IF APPLICABLE)

Business income

\$

Business debt / obligations

\$

Family depends on business income?

☐ Yes☐ No

ESTIMATED COVERAGE TARGET

Income need + mortgage/debts + final/education/business goals - existing coverage/assets

Estimated additional life insurance need

\$

Comfortable monthly premium range

\$

☐ Term

☐ Permanent

☐ Unsure

Educational worksheet only; not an application, quote, or coverage guarantee. Do not enter SSN, bank, or medical details.