

Life Insurance Financial Analysis Worksheet

Use this worksheet as a basic financial analysis tool for estimating your family's coverage needs.

Financial Items (Not all items may apply to you and your circumstances)	Name _____	Name _____
	Date of Birth _____	Date of Birth _____
For each bold item below determine how much you want to cover and input the amount in the corresponding space under your name to provide an idea of total coverage. Desired coverage might not be the same for each person. Use the "Tab" key to advance to the next field.		
Financial Resources		
Cash and savings, CDs		
Securities		
Retirement accounts: IRA, ROTH IRA, 401K		
Current Life Insurance (do not include work policies, as those are not owned by you)		
Other Assets		
Total Financial Resources		
Existing Debts		
Mortgage		
Property Taxes		
Auto Loan		
Credit Cards		
Other Loans		
Total Existing Debts		
Future Expenses		
Income needs (consider 7-10 years of income)		
Emergency fund		
Child-care expenses		
College Tuition		
Funeral Expenses		
Probate		
Estate Taxes		
Uninsured Medical Costs		
Total Future Expenses		
Total Existing Debts + Total Future Expense = Total Financial Requirements		
Total Financial Resources - Total Financial Requirements = Life Insurance Needs		

Now that you have an amount in mind, let's see which carrier would be the best fit for your needs and budget. Book your call today, scan the QR Code or click the link.



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