

Life Needs Analysis

Name _____ Spouse Name _____

Employer _____ Employer _____

Children/Ages _____ Children/Ages _____

L
(Loans, Mortgage, Debt)

I
(Income Replacement)

F
(Final Expense)

E
(Education)

Current Life Insurance
(Individual/Group)

Liquid Assets

Do you know your number? Y/N

Total Life Need

Do you agree that this is the amount your family would need in the
event of your death? Yes _____ No _____

Income Today _____

Age Today _____

Retirement Age _____

YWEAF = _____