

# Life Insurance Review



Today's Date: \_\_\_\_\_ Client: \_\_\_\_\_  
 For \_\_\_\_\_

**Here are some questions to help you determine how much life insurance protection you may need.**

| <b>Final Expenses</b>   |                                      |                      |
|---|--------------------------------------|----------------------|
| How much money would be needed to clear up short-term obligations and pay for final expenses?<br>Consider medical costs, funeral expenses, and consumer debt. | <b>Total Final Expenses</b>          | \$ <b>A</b>          |
| <b>Mortgage Payoff</b>  |                                      |                      |
| How much money is needed to pay off your mortgage or provide family housing?  | <b>Total Housing Expenses</b>        | <b>B</b>             |
| <b>Income Replacement</b>   |                                      |                      |
| How long would you want to extend your income stream?   | Number of Years                      |                      |
|   | x Current Annual Income              |                      |
|   | <b>= Total Income Replacement</b>    | <b>C</b>             |
| <b>Education</b>  |                                      |                      |
| How much will your children/grandchildren need to complete their education?   | Annual Tuition                       |                      |
|   | x Number of Years                    |                      |
|   | x Number of Children                 |                      |
|   | <b>= Total Tuition Expense</b>       | <b>D</b>             |
| <b>TOTAL LIFE INSURANCE NEEDED TODAY</b>  | <b>= A + B + C + D</b>               | <input type="text"/> |
|   | <b>- Current Amount of Insurance</b> |                      |
| <b>TOTAL LIFE INSURANCE DEFICIT/SURPLUS</b>   |                                      | <input type="text"/> |

Ask about the variety of life insurance products offered through Henry Insurance Service.

## HENRY INSURANCE SERVICE

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Fax completed Survey to

# 225-926-8510

Attn: \_\_\_\_\_

or email to:

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