



Client Worksheet

Using Life Insurance to Help Build Your Legacy

Use this worksheet to help gauge your financial situation. With the legacy building strategy using life insurance, the goal is to provide death benefit protection and to help pass along a portion of your financial success to heirs.

GENERAL INFORMATION

Immediate Family			
		Gender	Date of Birth
You	Name	Male ☐ Female ☐	
Married?	Yes ☐ No ☐		
Spouse	Name	Male ☐ Female ☐	
Children	Name(s)		

Address			
Home Phone		Work Phone	
Cell Phone		Email	

Preferred Contact Method and Time	

OCCUPATIONAL INFORMATION

Occupation		
Annual Income	You	Spouse

RETIREMENT INCOME SOURCES

Retirement Vehicles	Current Value		Amount You Contribute			
	You	Spouse	Monthly		Yearly	
			You	Spouse	You	Spouse
401(k), 403(b), SEP-IRA						
IRA (traditional)						
Roth IRA						
Annuities						
Certificates of Deposit (CDs)						
Pension Plan						
Social Security						
Savings Account						
Real Estate						
Other Retirement Assets						

Are you currently taking required minimum distributions (RMDs) or plan to in the future and don't have a need for the funds?

What are your wishes for passing along assets to your beneficiaries?

List the funds you have set aside that you plan to pass along to heirs. (List the type and amount, e.g. Certificate of Deposit \$50,000)

Make a list of the family, friends, or charities you would like to benefit.

Name	Address	Share (%) or Amount (\$)