



Client Worksheet

Mortgage Amount _____ Monthly Payments \$ _____ Equity _____

Client Name: _____
Birthdate: _____ Age _____

Spouse/Co-Borrower Name: _____
Birthdate: _____ Age _____

Clients Financial Situation

Work Life Insurance: _____
Private Life Insurance: _____
Work Income: _____
Pensions: _____ % spouse gets: _____
Social Security: _____
Disability other income _____
Driving Record: DUI/3 or more moving Violations Yes No

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Total income Individually \$ _____ Total combined income \$ _____ Total Income individually \$ _____

Income after spouse passed _____ Income after spouse passed _____

- **Q:** Should you not qualify.... What assets do you have currently that act like mortgage protection if you were to die today? And is it enough to pay the mortgage off? Such as: 401K IRA's CD'S Saving/Checking Mutual Funds Bonds Annuities: _____
- **Q:** Is there a spouse or loved one who would be financially impacted by the death of the proposed insured? Y / N
- **Q:** Are you doing anything currently to pay off your mortgage in advance? Y / N

Single People:

Who is responsible for the home after Passing? _____
Would they be able to pay for their bills and yours? Y / N

Protection Plans Options

Client: _____

Spouse/Co-Borrower: _____

Option Plan 1 Death Benefit _____
____ Yrs. = \$ _____ ROP \$ _____ = _____
____ Yrs. = \$ _____ ROP \$ _____ = _____

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____ Yrs. = \$ _____ ROP \$ _____ = _____
____ Yrs. = \$ _____ ROP \$ _____ = _____

Option Plan 2 Death Benefit _____
____ Yrs. = \$ _____ ROP \$ _____ = _____
____ Yrs. = \$ _____ ROP \$ _____ = _____

Options Plan 2 Death Benefit: _____
____ Yrs. = \$ _____ ROP \$ _____ = _____
____ Yrs. = \$ _____ ROP \$ _____ = _____

Option Plan 3 Death Benefit : _____
____ Yrs. = \$ _____ ROP \$ _____ = _____
____ Yrs. = \$ _____ ROP \$ _____ = _____

Options Plan 3 Death Benefit : _____
____ Yrs. = \$ _____ ROP \$ _____ = _____
____ Yrs. = \$ _____ ROP \$ _____ = _____

From a Budget & Protection Standpoint, Which Option Will Work For You