






Cash and income needs analysis

	Client A	Client B
 <p>Final expenses fund To Provide for expenses your survivors will face at your death, such as funeral expenses, medical bills, administrative costs, and legal fees.</p>	\$ _____	\$ _____
 <p>Debt fund To help pay all outstanding bills, loans, and credit card balances.</p>	\$ _____	\$ _____
 <p>Emergency fund Prepare for the unexpected with an emergency fund of 3-6 month's expenses.</p>	\$ _____	\$ _____
 <p>Mortgage/Rent fund Mortgage balance \$ _____ or Monthly rent of \$ _____ for _____ years</p>	\$ _____	\$ _____
 <p>Education fund To provide for education of your children or grandchildren in the event of your death.</p>	\$ _____	\$ _____
 <p>Income replacement¹ To provide an income for your survivors. Monthly income of \$ _____ for _____ years</p>	\$ _____	\$ _____
 <p>Legacy To provide for your favorite charity, non-profit organization or school in the event of your death. To leave a legacy for your family.</p>	\$ _____	\$ _____
Subtotal	\$ _____	\$ _____
Subtract savings, investments, non-qualified annuities and existing life insurance	\$ _____	\$ _____
Total dollars required	\$ _____	\$ _____

¹ To take into consideration Social Security benefits, go to Social Security website, www.ssa.gov.



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