

Final Expense Client Worksheet

★ **Client:**

Phone:

Address:

★ **Why**

★ **Beneficiaries**

1) _____ relation: _____

2) _____ relation: _____

3) _____ relation: _____

★ **Health**

Height:

Weight:

★ **Options**

Face: \$ _____ Premium: \$ _____

Face: \$ _____ Premium: \$ _____

Face: \$ _____ Premium: \$ _____

★ **Notes**