

# Needs Analysis

Email Address: \_\_\_\_\_

Client Name: \_\_\_\_\_

Age:      DOB:    /    /

Smoker?   Y / N

DUI's, License Suspensions,  
Felonies Past 10 Years?   Y / N

Any Major Health Issues  
in Your Lifetime?

Cancer   Heart Issues   Strokes  
Diabetes   Respiratory Disorders  
Kidney Disease Other?

\_\_\_\_\_  
Loan Amount

\_\_\_\_\_  
Monthly Mortgage Payment

\_\_\_\_\_  
Length of Loan

\_\_\_\_\_  
Paying Extra/Plan To

\_\_\_\_\_  
Equity in Home

Client Name: \_\_\_\_\_

Age:      DOB:    /    /

Smoker?   Y / N

DUI's, License Suspensions,  
Felonies Past 10 Years?   Y / N

Any Major Health Issues  
in Your Lifetime?

Cancer   Heart Issues   Strokes  
Diabetes   Respiratory Disorders  
Kidney Disease Other?

Any Medications Currently Prescribed?  
Any Medications as Needed?

          Name          Dosage          Reason          

Any Medications Currently Prescribed?  
Any Medications as Needed?

          Name          Dosage          Reason          

Any Medication You Were Prescribed  
in the past 10 Years but Not Currently  
Taking?

          Name          Dosage          Reason          

Any Medication You Were Prescribed  
in the past 10 Years but Not Currently  
Taking?

          Name          Dosage          Reason          

Current Height \_\_\_\_\_ Current Weight \_\_\_\_\_

Current Height \_\_\_\_\_ Current Weight \_\_\_\_\_

# Creating Value

Full Time   Part Time   Retired

Full Time   Part Time   Retired

Monthly Take Home Income

Monthly Take Home Income

Amount   Type of Income   Survivorship \$ / %

Amount   Type of Income   Survivorship \$ / %

Any Private Life Insurance Outside of  
Employee Benefits?

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Employee Benefits?

Company Name   Coverage Amount   Monthly Payment   Company Name   Coverage Amount   Monthly Payment

Amount Left Behind After  
Death of Spouse

Household Income/ Month

Amount Left Behind After  
Death of Spouse

Calculate Monthly Expenses

Amount after Expenses

- Mortgage Payment
- Car Payment
- Utilities
- Car Insurance
- Student Loan
- Credit Card
- ETC

=

Amount after Expenses

÷ 4

÷ 4

=

Income / Week

=

Income / Week

Plans:   Amount   Length   Price

Plans:   Amount   Length   Price

A

A

B

B

C

C