



# Life Insurance Needs Form

## Step 1: Client Information

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First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Age: \_\_\_\_\_ Sex:  Male  Female

## Step 2: Cash Needed

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Estate Clearance Fund (Funeral, legal costs, notes and obligations, duties, medical bills.)	\$ _____
Mortgage or Rent Continuation Fund	\$ _____
Emergency Fund	\$ _____
Education Fund	\$ _____
<b>Total Cash Needed</b>	<b>\$ _____</b>

## Step 3 - Monthly Income

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Continuing Monthly Income	\$ _____
Less CPP/QPP Benefits	\$ _____
<b>Monthly Income Required</b>	<b>\$ _____</b>

## Step 4: Cash Available

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Personal Life Insurance	\$ _____
Group Life Insurance	\$ _____
CCP Death Benefit	\$ _____
Bonds, Stocks and Mutual Funds	\$ _____
Real Estate (Other than home)	\$ _____
Other Available Assets	\$ _____
Cash On Hand (Savings)	\$ _____
<b>Total Cash Available</b>	<b>\$ _____</b>