

Life Insurance Goals

Person: _____

Goal for Having Life Insurance

Paying for your Final Expenses

- Funeral
- Cemetery Plot
- Grave Marker
- Legal Fees
- Medical Bills
- Other:

Estimated Cost

% to Pay

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Paying off Debts:

- Mortgage
- Auto Loans
- Farm/Business Loans
- Credit Cards
- Other:

Amount Outstanding

% to Pay

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Providing Annual Income for your Dependents

- Spouse/Partner
- Children
- Others

Annual Amount

Number of Years

_____	_____
_____	_____
_____	_____

Buying Out your Partner's Heirs

- A. Current Value of Entire Business
- B. Partner's Ownership Percentage
- C. Percent You Want to Buy Out
- Dollar Amount Needed (A x B x C)

Special Goals for your Heirs

- Child's Education
- Provisions for Heirs with Special Needs
- Other

Amount Needed

% to Pay

_____	_____
_____	_____
_____	_____

Leaving a Legacy

- Gifts to Charities, etc.
- Endowing a Scholarship
- Other

Amount Needed

% to Pay

_____	_____
_____	_____
_____	_____