



Life Insurance Needs Estimator

Client Name _____ Agent Name _____ Date: _____



Outstanding Debts (Credit Card, Car Loan, Home Equity, etc.)	\$ _____
	+
Funeral Costs (\$10,000 - \$15,000)	\$ _____
	+
Mortgage Balance (Or 10 Years Rent)	\$ _____
	+
Education Expenses \$10,000-\$20,000 per year per child - Public \$20,000-\$40,000 per year per child - Private	\$ _____
	+
Income Replacement (5-8 times Annual Income)	\$ _____
	=
Subtotal	\$ _____
	-
Cash, Savings Accounts, and Investments	\$ _____
	-
Existing Life Insurance	\$ _____
	-
Total Estimated Life Insurance Needs	\$ _____

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