

Family Cash Need Analysis

	Agent	:	Date:
Family Information	D.O.B.		Names and Last Names
Principal Insured			
Additional Insured			
Child 1			
Child 2			
Child 3			
Child 4			
	INCOME	ANALYSIS	
Husband	\$		
Wife	\$		
Other Income	\$		
Yearly Total	\$		
		RETIREMENT	
IRA / 401K / CD / Others - Husband	\$		
IRA / 401K / CD / Others - Wife	\$		
GRAND TOTAL	\$		
		ANNUAL EXPE	NSES
Expense Categories	Monthly	Annually	Comments
Rent or Mortgage	\$	\$	
Additional Loans (2nd Mtge. / Line of CR)	\$0	\$	
Utilites (FPL / Gas / Water)	\$	\$	
Vehicle (Loans / Insurance / Maintenance & Gas		\$	
Meals & Entertainment	\$	\$	
Education (Tuition / Books / Boarding)	\$	\$	
Education (Tuition / Books / Boarding) Pre-Paid College Program	\$ \$	\$	25
Education (Tuition / Books / Boarding) Pre-Paid College Program Credit Cards (Visa, Mastercard, Amexco, etc)	\$ \$ \$	\$ \$ \$	ISORS
Education (Tuition / Books / Boarding) Pre-Paid College Program Credit Cards (Visa, Mastercard, Amexco, etc) Alarm / Cable / Landscaping	\$ \$ \$ \$ \$	\$ \$ \$ \$ \$	ISORS
Education (Tuition / Books / Boarding) Pre-Paid College Program Credit Cards (Visa, Mastercard, Amexco, etc) Alarm / Cable / Landscaping Telephone & Internet	\$ \$ \$ \$ \$ \$	\$ \$ \$ \$ \$ \$	ISORS
Education (Tuition / Books / Boarding) Pre-Paid College Program Credit Cards (Visa, Mastercard, Amexco, etc) Alarm / Cable / Landscaping Telephone & Internet Health - Dental Insurance	\$ \$ \$ \$ \$ \$ \$ \$	\$ \$ \$ \$ \$ \$ \$ \$ \$	ISORS
Education (Tuition / Books / Boarding) Pre-Paid College Program Credit Cards (Visa, Mastercard, Amexco, etc) Alarm / Cable / Landscaping Telephone & Internet Health - Dental Insurance Life Insurance Policy	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	ISORS
Education (Tuition / Books / Boarding) Pre-Paid College Program Credit Cards (Visa, Mastercard, Amexco, etc) Alarm / Cable / Landscaping Telephone & Internet Health - Dental Insurance Life Insurance Policy Other Expense	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	SORS
Education (Tuition / Books / Boarding) Pre-Paid College Program Credit Cards (Visa, Mastercard, Amexco, etc) Alarm / Cable / Landscaping Telephone & Internet Health - Dental Insurance Life Insurance Policy	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	ISORS



PURPOSE OF INSURANCE					
Categories		Comments			
Income Replacement					
Mortgage Protection					
College Tuition					
Supplemental Retirement					
Final Expenses					
Legacy					
Key Person Insurance					
Buy Sell Agreement					

Pre-Qualifications

HEALTH - ACTIVELY EMPLOYED - IMMIGRATION STATUS

Comments:

EMERGENCY CONTACT LIST - AWARENESS PROGRAMS

Family Name	Contact Info		Relationship
	ADDITIONAL N	OTES	
		505	