



Income protection analysis worksheet

Fact finder — short questionnaire

Today's date: _____

Client information (client A)

Client name: _____

Gender: _____ Date of birth: _____

☐ Married ☐ Single ☐ Divorced ☐ Widowed

Tabacco use: ☐ Yes ☐ No

Occupation: _____

☐ W2 Employee ☐ 1099 Employee

Underwriting class: _____

State of residence: _____

Number of children: _____

Financial information

Client A annual income: \$ _____

Client B annual income: \$ _____

Other annual income (including bonuses): \$ _____

Total adjusted gross income: \$ _____

Client information (client B)

Client name: _____

Gender: _____ Date of birth: _____

☐ Married ☐ Single ☐ Divorced ☐ Widowed

Tabacco use: ☐ Yes ☐ No

Occupation: _____

☐ W2 Employee ☐ 1099 Employee

Underwriting class: _____

State of residence: _____

Number of children: _____

Other financial advisors

CPA: _____

Attorney: _____

Property & casualty advisor: _____

Investment advisor: _____

Trust advisor: _____

Assets

Asset Name		Client A	Client B	Joint
Miscellaneous (Personal property, boats, cars, jewelry, collectibles, planes, etc.)	\$	\$	\$	
Retirement plans (401(k), IRA, pensions, etc.)	\$	\$	\$	
Life insurance	\$	\$	\$	
Individual disability	\$	\$	\$	
Group disability	\$	\$	\$	
Long term care insurance	\$	\$	\$	
Total assets	\$	\$	\$	

Liabilities and Net Worth

Liabilities		Client A	Client B	Joint
Real estate mortgages	\$	\$	\$	
Student loans	\$	\$	\$	
Auto loans	\$	\$	\$	
Other debts	\$	\$	\$	
Total Liabilities	\$	\$	\$	
Net Worth (Total Assets – Total Liabilities)	\$	\$	\$	

Goals

Indicate primary goals you would like to plan for (check all that apply):

- ☐ Replace family income ☐ Provide for mortgage/debt liquidation ☐ Provide for estate supplement cost & taxes
☐ Taxes charitable gift insurance plan ☐ Insure/supplement retirement funds* ☐ Insure/supplement college fund*
☐ Provide for special needs planning ☐ Other: _____

Check if maximum contribution is being made to your Qualified Retirement Plan

*Approximate years until the supplemental funds are needed: _____

Education start: _____ End: _____ Retirement start: _____

Concerns: _____

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