

## Life Insurance Needs Calculator Questionnaire

### 1. Estimate your family's expenses in case of your death

Amount needed for Final Expenses? \_\_\_\_\_

Outstanding debts (other than your mortgage)? \_\_\_\_\_

Outstanding mortgage? \_\_\_\_\_

How many children require college funding? \_\_\_\_\_

What are their current ages? \_\_\_\_\_

Private or Public College? \_\_\_\_\_

### 2. Total annual income your family would need if you died today

Total annual income? \_\_\_\_\_

How many years should income be provided? \_\_\_\_\_

What are your current savings investments (not including retirement funds)?  
\_\_\_\_\_

What are your current retirement savings? \_\_\_\_\_

How much life insurance is currently in force? \_\_\_\_\_

### 3. Assuming your spouse would work following your death

What is or would be your spouse's annual income? \_\_\_\_\_

How many years does your spouse expect to work? \_\_\_\_\_

Your spouse's marginal tax rate? \_\_\_\_\_

### 4. Extras

Estimated inflation rate? \_\_\_\_\_

After-tax net investment yield? \_\_\_\_\_