

## Family Needs Analysis

Date: \_\_\_\_\_

Agent: \_\_\_\_\_

Name: \_\_\_\_\_

DOB: \_\_\_\_\_

Spouse: \_\_\_\_\_

DOB: \_\_\_\_\_

Current Jobs: \_\_\_\_\_

Previous Jobs: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Beneficiaries / Children

Beneficiary Name: \_\_\_\_\_ Age: \_\_\_\_\_

Grandchildren: \_\_\_\_\_

Beneficiary Name: \_\_\_\_\_ Age: \_\_\_\_\_

Grandchildren: \_\_\_\_\_

Beneficiary Name: \_\_\_\_\_ Age: \_\_\_\_\_

Grandchildren: \_\_\_\_\_

### Assets / Liabilities

	Husband	Wife
<b>Life Insurance</b>		
Personal:		
Work:		
Health:		
<b>Current Retirement Plans</b>		
401K, 403B, 457: (10-50K, 50-100k, 100-500k, 500k+)		
Pension: (10-50K, 50-100k, 100-500k, 500k+)		
SEP IRA / Roth IRA: (10-50K, 50-100k, 100-500k, 500k+)		

Previous Retirement Plans		
Rollover IRA, Traditional IRA: (10-50K, 50-100k, 100-500k, 500k+)  401K, 403B, 457: (10-50K, 50-100k, 100-500k, 500k+)  Pension: (10-50K, 50-100k, 100-500k, 500k+)  Brokerage Accounts: (10-50K, 50-100k, 100-500k, 500k+)		

Bank Accounts		
Checking Accounts:  Savings Accounts:  Money Markets:  CD's:  Other Accounts:		

### Product Suitability

Monthly Work Income:	\$ _____
Social Security Income:	\$ _____
Pension Income:	\$ _____
Other Income:	\$ _____
Total (=):	\$ _____
Monthly Fixed Expenses (-):	\$ _____
Discretionary Income (=):	\$ _____