



Life Insurance Review Fact Finder

Please complete the following boxes and return to our office.

Today's Date: _____

Personal Information

Client Name 1: _____

Date of Birth: _____

Client Name 2: _____

Date of Birth: _____

Current Life Policies in Force

Client 1	Policy #1	Policy #2	Policy #3	Policy #4	Policy #5
<i>Insurance Policy Name</i>					
<i>Death Benefit</i>					
<i>Cash Value</i>					
<i>Premium</i>					
<i>Term or Whole Life?</i>					

Client 2	Policy #1	Policy #2	Policy #3	Policy #4	Policy #5
<i>Insurance Policy Name</i>					
<i>Death Benefit</i>					
<i>Cash Value</i>					
<i>Premium</i>					
<i>Term or Whole Life?</i>					

Do you feel your current life insurance coverage is adequate? _____

Are the beneficiaries named on your current policies accurate? _____

Would you like us to run a Life Insurance Analysis on you? _____

(If yes, then please complete the information below)

\$ Needs in case of a premature death today	Client 1	Client 2
<i>Emergency Needs (funds available for unexpected expense, major repairs, etc)</i>		
<i>Debts (credit cards, lines of credit, car loans, etc)</i>		
<i>Funeral Expenses</i>		
<i>Estate Administration Expenses</i>		
<i>Home Mortgage (outstanding loan value)</i>		
<i>Education (enter a dollar amount you wish to make available for kids / gkids)</i>		
<i>Gift (gift to kids, grandkids, church, charity)</i>		

Current Income	Client 1	Client 2
<i>Estimated monthly income</i>		

Securities offered through LPL Financial, member FINRA/SIPC. Investment advisory services offered through Independent Advisors Alliance, LLC, a registered investment advisor. One Tree Hill Investment Advisors and Independent Advisor Alliance, LLC are separate entities from LPL Financial.

The LPL Financial representatives associated with this Website may discuss and/or transact securities business only with residents of the states in which they are properly registered or licensed. No offers may be made or accepted from any resident of any other state.