One Tree Hill
Investment Advisors

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
Insurance Policy Name					
Death Benefit					
Cash Value					
Premium					
Term or Whole Life?					

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

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
Emergency Needs (funds available for unexpected expense, major repairs, etc)		
Debts (credit cards, lines of credit, car loans, etc)		
Funeral Expenses		
Estate Administration Expenses		
Home Mortgage (outstanding loan value)		
Education (enter a dollar amount you wish to make available for kids / gkids)		
Gift (gift to kids, grandkids, church, charity)		

Current Income	Client 1	Client 2
Estimated monthly income		