

Cash Needs

Mortgage Balance

Other Debts/Expenses

Funeral Expenses

College Expenses

Total Cash Need

Income Replacement

How much income would you like to replace annually?

How many years would you like to replace this income?

Inflation Rate (recommended range: 2.5%-4.5%)

Growth Rate

Lump Sum Needed at Death to Replace Income

Assets Available

Savings and Investment Accounts

Retirement Savings (if available)

Current Life Insurance

Total Assets Available

Estimated Amount of Life Insurance Needed