

Life Insurance Needs Analysis

	Client	Spouse
Final Expenses <i>National average is \$10,000-\$15,000</i>	_____	_____
Debt <i>Mortgage, credit card, auto loan, etc.</i>	_____	_____
Education <i>Desired amount to provide survivors</i>	_____	_____
Income <i>Annual income you wish to provide survivors x number of years of need</i>	_____	_____
Special <i>Child's wedding, dream vacation for surviving family, etc.</i>	_____	_____
Total	_____	_____
(Current coverage)	_____	_____
Total need	_____	_____

Investment and Insurance Products: NOT FDIC Insured | NO Bank Guarantee | MAY Lose Value

Securities offered through H.D. Vest Investment ServicesSM, Member: SIPC,
 Advisory services offered through H.D. Vest Advisory ServicesSM,
 6333 N. State Highway 161, Fourth Floor, Irving, TX 75038, (972) 870-6000.