TRICOR INC.
INSURANCE

Client Name

Date Completed

Life Insurance & Disability Income Review

	Yes	No	Info	Notes
Do you have any individual life insurance policies?				
If yes, are the beneficiaries listed properly?				
If yes, would you like us to review them?				
Do you have disability income insurance to pay lost wages if you get hurt or sick?				
Do you have an updated will &/or estate plan or trust?				
Would you like us to do a basic life insurance needs assessment? "takes less than three minutes"				

Life Insurance Proposal

EMC Accelerated Term

Instructions - chose one of three fast and easy options

EMC - Quick Quote Link

VIP Life Brokerage Plus

VIP Instructions - Select Co. & Plan Choose one of three options

VIP - Quick Quote Link

Do not open with IE Explorer Instead use Chrome or Fire Fox.

Disability Income

How do I ask? How much does it cost? Which class applies?

IM Disability Quick Quote Link

Life Insurance Needs Assessment*

First Person Name | Spouse or Partner Name		
Burial & Final Expenses		
Total Debt Include both first person and spouse or partner debt and add to make a single total amount. Planned future debt could also be considered.		
Educational needs for surviving family members		
How much of first persons annual income is needed for surviving family?		
For How Many Years?		
Total Amount Needed	$ 0	
How much of spouse or partners annual income is needed for surviving family?		
For How Many Years?		
Total Amount Needed		$ 0
Total Life Insurance Needed	$ 0	$ 0 Ignore this column if no spouse or partner
Deduct Life Insurance remaining in force "enter as NEGATIVE - example -100,000"		
Total Life Insurance Needed	$ 0 First Person	$ 0 Partner-Spouse