Client Profile Fact Finder

Financial Information

Employment Income: $_____

Social security income: $_____

Pension(s) income: $_____

Other income: $_____

Qualified funds: $_____

Non-qualified: $_____

Stocks & bonds: $_____

Life Insurance Policies Total Cash Value: $_____

NQ Annuities - List individually if more than One:

Annuity 1 Value: $_____

How much is gain: $_____

Annuity 2 Value: $_____

How much is gain: $_____

Annuity 3 Value: $_____

How much is gain: $_____

Annuity 4 Value: $_____

How much is gain: $_____

LTC Policy information (if prospect has existing coverage):

Name or Carrier: _____

Date purchased: _____

Rate increases? _____

% increase: _____

Benefits Info:

Daily/Monthly Benefit: $_____ Day/Month

Benefit Period: _____Days/Months/Years

Total Lifetime Benefit/Pool of Money: $_____

Inflation protection: _____

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