



Goals

Life Insurance Needed: \$

Refer to Week 6. Your Life Insurance Worksheet has this information.

Where you able to free up some money refinancing your mortgage? Yes No

If Yes, How much? \$

Are you interested in funding a college/wedding? Yes No

If Yes, What is the total amount you want available? \$

If Yes, How many years until you need to start pulling on that money?

Are you interested in establishing a life insurance program for your children: Yes No

If Yes, How many children would you like to insure?

If Yes, How much for each child? \$

Are you interested in establishing a funeral plan? Yes No

If Yes, when would you like to fund that funeral plan? Now 1-5 Yrs 5-10Yrs 10+Yrs

Do you have any medical conditions that may prohibit you from obtaining life ins.? Yes No

Please return my Life Insurance Form to this E-mail address:

E-mail to info@prospersbs.com for Recommendations

For Office Use Only

Blank grid for office use only.

