

PROTECTION PLAN FORM

For: _____

1) Annual income amount needed to provide for family	\$ _____
2) Money available	
Social security	\$ _____
Surviving Spouse's income	\$ _____
Income from investments	\$ _____

Total income at husband/wife death	\$ _____
3) Additional income needed (Annual income needed less income at husband/wife death)	
\$ _____ - _____	\$ _____
4) Investment capital required to fund above (_____ / .05)	\$ _____
5) Additional amounts required:	
Funeral costs	\$ _____
Estate costs	\$ _____
Debt liquidation	\$ _____
College	\$ _____
Taxes for estate-Federal & State	\$ _____

Total additional amounts	\$ _____
6) Total required (Investment capital + total additional)	\$ _____
Present life insurance in place	\$ _____
7) Total insurance needed (Total required - present insurance)	\$ _____