

Risk Review Worksheet

"For us to protect your assets, we need to know what they are. This worksheet will help us determine how much coverage you need."

- 1. Home Equity _____
 - 2. Checking/Savings _____
 - 3. Roth IRA/401(k) _____
 - 4. Previous Work 401(k) _____
 - 5. Real Estate _____
 - 6. Cash Value Life Ins. _____
 - 7. What else? _____
- Total Assets = _____

Income at Risk

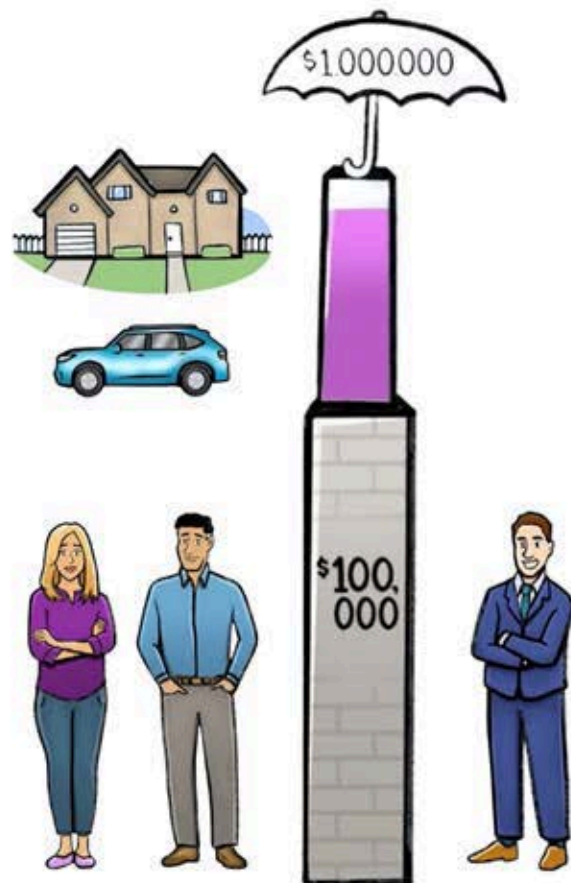
Annual Income _____ X .25 x 10 years = _____

Total Assets Risk + Income Risk = _____

Your Current Liability Coverage = _____

Total Risk - Current Liability = _____

Your Liability Need = _____



Notes: