

# CLIENT WORKSHEET



**FAMILY FIRST LIFE**  
THE ROGUE IMO

## Client Information

Email: \_\_\_\_\_

Date: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_

DOB: \_\_\_\_\_

Retired / Employed: \_\_\_\_\_

Monthly Income: \_\_\_\_\_

(Social Security, Pension)

Family / Beneficiary: \_\_\_\_\_ Burial / Cremation \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_

DOB: \_\_\_\_\_

Retired / Employed: \_\_\_\_\_

Monthly Income: \_\_\_\_\_

(Social Security, Pension)

Family / Beneficiary: \_\_\_\_\_ Burial / Cremation \_\_\_\_\_

## Medical Information

Heart Attack / Stroke / TIA / Cancer / Stints / Diabetes (Pills vs Insulin) / Neuropathy / HBP Lupus/RA / Asthma & COPD (Albuterol vs Corticosteroid) / Thyroid / Anxiety-Depression / Kidney or Liver Disease / Dementia

Surgeries: \_\_\_\_\_ Smoker: Y / N \_\_\_\_\_

Medications: \_\_\_\_\_

Surgeries: \_\_\_\_\_ Smoker: Y / N \_\_\_\_\_

Medications: \_\_\_\_\_

## Mortgage Information

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_  
Balance Monthly payment Terms Todays Value Equity Mortgage Date

## Current Life Insurance

Company \_\_\_\_\_ \$ \_\_\_\_\_ Death Benefit \_\_\_\_\_ Benefactor \_\_\_\_\_

Alternative Coverage \_\_\_\_\_ \$ \_\_\_\_\_ Amount \_\_\_\_\_  
(401K, TSP, CDs, Cash, Etc.)

Company \_\_\_\_\_ \$ \_\_\_\_\_ Death Benefit \_\_\_\_\_ Benefactor \_\_\_\_\_

Alternative Coverage \_\_\_\_\_ \$ \_\_\_\_\_ Amount \_\_\_\_\_  
(401K, TSP, CDs, Cash, Etc.)

## Medicare Information

Do you have a Medicare Supplemental Plan? Y / N

Carrier \_\_\_\_\_ Plan \_\_\_\_\_ \$ \_\_\_\_\_ Premium \_\_\_\_\_

Do you have a Medicare Advantage ? Y / N

Carrier \_\_\_\_\_ \$ \_\_\_\_\_ Premium \_\_\_\_\_

Do you have a Medicare Supplemental Plan? Y / N

Carrier \_\_\_\_\_ Plan \_\_\_\_\_ \$ \_\_\_\_\_ Premium \_\_\_\_\_

Do you have a Medicare Advantage ? Y / N

Carrier \_\_\_\_\_ \$ \_\_\_\_\_ Premium \_\_\_\_\_

## Estate Planning

(www.doyourownwill.com)

Do you have a will? Y / N Last Updated: \_\_\_\_\_

Do you have a will? Y / N Last Updated: \_\_\_\_\_

OPTION #1

OPTION #2

OPTION #3