



.Date: _____

Name: _____



How much life insurance do I / we need?

Debts:

Mortgage [Total amount owing & for how long]	
Loans and Other Needs	
Loans / Line of Credit [How much & how long]	
Final Expenses [I recommend \$30,000 - \$50,000]	
Other Cash Needs [i.e. money for kids' school, wedding, or first home downpayment]	
TOTAL CASH NEEDS A	

Annual income needed for my family after I am gone	
For how many years	
Annual raise for inflation wanted	Yes No
Income X Number of years B	

Assets Available

Cash (Savings)	
RRSPs	
Stocks, Bonds, Mutual Funds	
Real Estate [Rental & Recreational only]	
Life Insurance	
CPP Death Benefit	\$2,500
Other Assets [i.e.business holdings]	
TOTAL ASSETS C	

Total needs =

$$\begin{aligned}
 & \mathbf{A} \underline{\hspace{2cm}} + \mathbf{B} \underline{\hspace{2cm}} - \mathbf{C} \underline{\hspace{2cm}} \\
 & \hspace{10em} = \underline{\hspace{4cm}}
 \end{aligned}$$

Note: This will give you a good idea. For final numbers, a more thorough analysis should be done.

Once done, please fax back to 403-206-7400.