

If it's ok with you, I'm going to ask you a few questions just to be sure I'm **not** showing or suggesting something that is inappropriate or not needed. I don't want to go down the wrong road and show you something that you don't need.

- 1. Husband, insurance in place now with employer? Term? \_\_\_\_\_
- Husband, insurance in place now owned personally? Term? \_\_\_\_\_
- Spouse, insurance in place now with employer? Term? \_\_\_\_\_
- Spouse. Insurance in place owned personally? Term? \_\_\_\_\_

**2. If you passed away, do you have retirement savings in place to help? Like 401K's or IRA, TSP, Mutual Funds etc.?**

	Husband	/	Wife
IRA	_____		_____
401K	_____		_____
Mutual funds	_____		_____
CD's	_____		_____

- Is the 401k with your current employer or just parked out there?** \_\_\_\_\_
- Have you ever rolled an old 401k into your current plan?** \_\_\_\_\_
- How much did you roll into your new 401k?** \_\_\_\_\_

- 3. Are you still trying to grow retirement income and savings? \_\_\_\_\_
- 4. **Are you taking Required Minimum Distributions? (if over 70)** \_\_\_\_\_
  - a. Has anyone shown you a RMD spend down schedule? (if 65 years or older) \_\_\_\_\_
  - b. Do you want to take the RMD for income? \_\_\_\_\_
  - c. Would you rather not take the RMD's and preserve your asset for your beneficiary? \_\_\_\_\_
- 5. Do you currently have long term care insurance? \_\_\_\_\_
- 6. Why or who are you trying to protect with the mortgage protection insurance?  
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