

LIFE INSURANCE REVIEW PROGRAM



Prescription for Life

Fact Finder

What do you intend to ultimately do with these assets?
Do you need the income from these assets to meet your monthly living expenses?

Taxed Now Assets

(Income tax may be payable on interest, dividend income and capital gains)

Description	Is Income Needed?		Where Do You Ultimately Want These Assets To Go?		
	Yes	No	Children	Grandkids	Charity
Savings Accounts \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checking Accounts \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C.D.s \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stocks \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bonds \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mutual Funds \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sub-Total \$ _____					

Taxed Later Assets

(May be subject to income and estate taxes)

Description	Is Income Needed?		Where Do You Ultimately Want These Assets To Go?		
	Yes	No	Children	Grandkids	Charity
IRAs \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
401(k)/403(b) \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fixed Annuities \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variable Annuities \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Savings Bonds \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sub-Total \$ _____					

Taxed Never Assets

(May be subject to estate taxes)

Description	Is Income Needed?		Where Do You Ultimately Want These Assets To Go?		
	Yes	No	Children	Grandkids	Charity
Roth IRAs \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Muni-Bonds \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life Ins.-Husband \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life Ins.-Husband \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life Ins.-Wife \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life Ins.-Wife \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Life Ins.-Joint \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sub-Total \$ _____					
Total All Assets \$ _____					

CLIENT INFORMATION

Client Name	DOB
Spouse Name	DOB
Children's Names	DOB
	DOB
	DOB
	DOB

SUMMARY FOR TAX-EFFICIENCY CHECK-UP

Not FDIC/NCUA insured. May lose value. No bank/credit union guarantee. Not a deposit. Not insured by any federal government entity.

Universal Life Insurance products are issued by Sun Life Insurance Company of Canada (Wellesley Hills, MA) and Variable Universal Life Insurance products are issued by Sun Life Insurance Company of Canada (U.S.) (Wellesley Hills, MA). In New York, Universal Life and Variable Universal Life Insurance products are issued by Sun Life Insurance and Annuity Company of New York (New York, NY). All are members of the Sun Life Financial group of companies. Variable products are distributed through Sun Life Financial Distributors, Inc.

All guarantees are based on the claims-paying ability of the issuing company, either Sun Life Assurance Company of Canada (Wellesley Hills, MA), Sun Life Assurance Company of Canada (U.S.) (Wellesley Hills, MA), or in New York, Sun Life Insurance and Annuity Company of New York (New York, NY). All are members of the Sun Life Financial group of companies.

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