

Problem & Resource Identification Worksheet



Problem Identification Worksheet

Client _____ Date _____

Problem Identified

P _____

P _____

P _____

P _____

P _____

P _____

P _____

P _____

P _____

S _____

S _____

S _____

S _____

S _____

S _____

S _____

S _____

S _____

G _____

G _____

G _____

G _____

G _____

G _____

G _____

G _____

G _____

D _____

D _____

Resource Identification Worksheet

Client _____ Date _____

Economic Life Value	Current Life Insurance Amount	Shortfall	Premium Needed
\$	\$	\$	Perm: \$
			Term: \$

Model #	Name of Resource	New Money	Current Cash Flow Available*	Old Money
		⇒	\$	⇐
		⇒	\$	⇐
		⇒	\$	⇐
		⇒	\$	⇐
		⇒	\$	⇐
		⇒	\$	⇐
		⇒	\$	⇐
		⇒	\$	⇐
		⇒	\$	⇐
		⇒	\$	⇐
		⇒	\$	⇐
	Additional \$	⇒	\$	
	Additional \$	⇒	\$	
	Additional \$	⇒	\$	
	Total Current Cash Flow			

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*Identification of any individual Current Cash Flow Available or portion thereof does not necessarily constitute a recommendation that it be used for any specific purpose.



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