

Client Data Form – Financial Planning | Part B | Personal Insurances

13.2 Lump Sum Insurance Needs

Client 1

	Death	TPD	Trauma
In the event of death, TPD or a medical event, would you like cover for:	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<i>If so, what are the amounts that you would require?</i>			
Discharge mortgage(s)	\$	\$	\$
Discharge personal debt(s)	\$	\$	\$
Provide funds for funeral costs	\$	\$	\$
Provide funds for emergency e.g. cash in bank	\$	\$	\$
Provide a lump sum for home and lifestyle alterations e.g. access ramps	\$	\$	\$
Provide a lump sum for medical costs e.g. major operations	\$	\$	\$
Other:	\$	\$	\$
Number of years income required for children's education			
Amount required each year for children's education	\$	\$	\$
Number of years income required for spouse/partner			
Amount required each year for spouse/partner	\$	\$	\$
Sub-total	\$	\$	\$
Self-insurance e.g. sale of assets, existing insurance	\$	\$	\$
Total	\$	\$	\$

Client 2

	Death	TPD	Trauma
In the event of death, TPD or a medical event, would you like cover for:	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<i>If so, what are the amounts that you would require?</i>			
Discharge mortgage(s)	\$	\$	\$
Discharge personal debt(s)	\$	\$	\$
Provide funds for funeral costs	\$	\$	\$
Provide funds for emergency e.g. cash in bank	\$	\$	\$
Provide a lump sum for home and lifestyle alterations e.g. access ramps	\$	\$	\$
Provide a lump sum for medical costs e.g. major operations	\$	\$	\$
Other:	\$	\$	\$
Number of years income required for children's education			
Amount required each year for children's education	\$	\$	\$
Number of years income required for spouse/partner			
Amount required each year for spouse/partner	\$	\$	\$
Sub-total	\$	\$	\$
Self-insurance e.g. disposable assets, existing insurance	\$	\$	\$
Total			