ADVANTAGE WEALTH PLANNING

PREPARED FOR

For Your Information

PRESENTED BY

Don Maycock

OCTOBER 2016

ADVANTAGEWEALTHPLANNING.CA

MISSION STATEMENT

HOW MUCH LIFE INSURANCE IS REQUIRED?
In this case, the client assets are $50K group life insurance and a home valued at $300K.
The clients debts are $200,000 mortgage, $25K car loan. Wants 10X his after tax income ($45K) to support his wife, should he die prematurely. He estimates a funeral would cost $10K, He wants his daughter's education to fully funded at $100K.

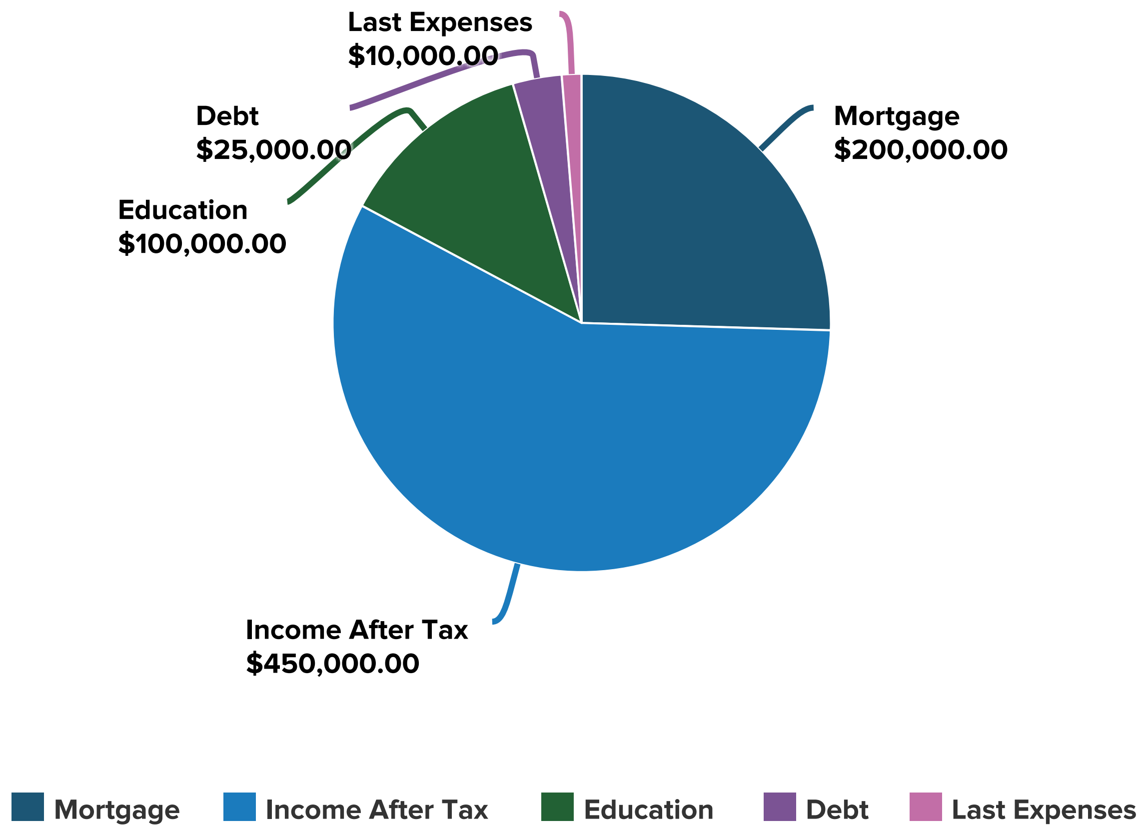
Disclaimer: While every effort has been made to ensure the information presented is accurate in its entirety, in the event of any discrepancy between the information herein and your insurance contract with the insurer / quotation from the insurer, the terms of the contract / insurer rates will apply. Please Refer to Manufacturer illustration for all dividend or Performance Credit information

Errors and omissions excepted(E&OE)

NEEDS ANALYSIS - PERSONAL

Current Insurance	-$50,000.00
Assets	-$300,000.00
Mortgage	$200,000.00
Income After Tax	$450,000.00
Education	$100,000.00
Debt	$25,000.00
Last Expenses	$10,000.00
Total	$435,000.00

* Total rounded to the nearest thousand.



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