



Client Needs Assessment

Date:

Discussing your client's health and family life is a crucial part of determining their insurance needs. Have they enrolled in Medicare yet? Do they have life insurance? Do they have children who will be going to college? Do they know someone who has needed long-term care? Is there a history of cancer, heart attack or stroke in their family? Opening up the lines of communication is what will lead you to identify the needs of your clients. It's not pushing more insurance products on them that they don't need. It's unearthing what they may or may not have in place and discussing options with them.

Client Information:

First Name:

Last Name:

Age:

DOB:

Address:

City:

State:

Zip Code:

Phone:

Email:

Spouse/Partner Information:

First Name:

Last Name:

Age:

DOB:

Medicare Information:

Medicare Supplement: Medicare Advantage:

Current Plan Name:

Carrier Name:

Current Premium:

Notes:





Client Needs Assessment

Life Insurance Information:

Current Plan Name:

Carrier Name:

Death Benefit: Cash Value:

Current Premium:

Notes:

Long-term Care Information:

Current Plan Name:

Carrier Name:

Current Premium:

Notes:

Critical Illness Information:

Current Plan Name:

Carrier Name:

Current Premium:

Notes:

Health Information:

Tobacco: Non-Tobacco:

Notes:

