



# Readjustment Income Questionnaire

The following questions are asked only to make an educated recommendation.

1. Who **choose** the amount of Coverage & Type of insurance? You / Agent Why? \_\_\_\_\_
2. What type of **Life Insurance Policy** do you have? Whole Life / Term / U.L / Not Sure – Date Purchased? \_\_\_\_\_
3. Has the **premium stayed**? Level / Increased / Decreased / Stopped \*Have you taken a loan on the policy? Y / N
4. When was the **last time** you did a **Full Review and Update** of your life insurance policies? \_\_\_\_\_
5. Do you understand the **paid-up insurance option** on your current Policy? Yes / No
6. Have you ordered your current **cash value, paid-up and loan value** statement for this year? Yes / No
7. Have you **ever** called the carrier and confirmed your policy **Will Not Lapse** before you pass away? Yes / No
8. One Social Security check and sometimes a pension **ends** when a spouse passes away. How many years of Spousal Social Security income would you **need to readjust your life**? 1 year / 2 years / 3 years / + more

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*Now I have a better understanding of your life insurance wishes, let's discuss some recommendation.*

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## Social Security Readjustment Income

\$	Main Social Security Check
\$	Spouse Social Security Check

Readjustment Income for 1 Year			Readjustment Income for 2 Year			Readjustment Income for 3 Year		
Coverage		Cost	Coverage		Cost	Coverage		Cost
\$	Main	\$	\$	Main	\$	\$	Main	\$
\$	Spouse	\$	\$	Spouse	\$	\$	Spouse	\$
Total Premium		\$	Total Premium		\$	Total Premium		\$

Agent Name: \_\_\_\_\_

Phone #: \_\_\_\_\_

