Life

MIDLAND NATIONAL®
A Sammons Financial Company

Using life insurance to help build your legacy

Client worksheet

with Midland National® Life Insurance Company

Use this worksheet to help gauge your financial situation. With the legacy-building strategy using life insurance, the goal is to provide death benefit protection and to help pass along a portion of your financial success to beneficiaries.

General information

Immediate family			
You			
Name		Male ☐ Female ☐	DOB:
Married?	Yes ☐ No ☐		
Spouse			
Name		Male ☐ Female ☐	DOB:
Children			
Name			
Name			
Name			

Address			
Home phone		**Work phone**	
Cell phone		**Email**	

Preferred contact method and time	

Occupational information

Occupation	You	Spouse
Annual income	You	Spouse

Retirement income sources

Retirement vehicles	Current value		Amount you contribute			
			Monthly		Yearly	
	You	Spouse	You	Spouse	You	Spouse
401(k), 403(b), SEP-IRA						
IRA (traditional)						
Roth IRA						
Annuities						
Certificates of Deposit (CDs)						
Pension plan						
Social Security						
Savings account						
Real estate						
Other retirement assets						

Are you currently taking required minimum distributions (RMDs) or plan to in the future and don't have a need for the funds?

What are your wishes for passing along assets to your beneficiaries?

List the funds you have set aside that you plan to pass along to heirs. (List the type and amount, e.g. Certificate of Deposit $50,000)

Have you considered how to pay for care in the event you can no longer take care of yourself? If so, list the funds available for that care.

Make a list of the family, friends, or charities you would like to benefit.

Name	Address	Share (%) or Amount ($)

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