

Goldwasser Insurance Advisors, LLC

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Matt L. Goldwasser, LUTCF, CLTC
 Managing Partner

Please provide the following so we can calculate the proper amount of life insurance for your family.

Spouse 1 _____ Spouse 2 _____

Date of Birth _____ Date of Birth _____

Occupation _____ Occupation _____

Educational Funding for children (Indicate either **Private** School or **Public** by child and grade level.)

Child's Name	Birth Date	Grade as of Next Sept	Grade K-4	Grade 5-8	Grade 9-12	4 years College	Graduate School
Example	01-02-1988	2	public	public	private	private	no

Mortgage Balance(s) \$ _____

Other major debt \$ _____

Desired (after tax) income for the family (exclusive of schooling and mortgage) to maintain their standard of living: \$ _____/month

Financial support needed for other family members \$ _____/month for ____/years

_____ 's Earned Income \$ _____/month

_____ 's Earned Income \$ _____/month

Assets currently available to produce income for the family

Personal Life Insurance \$ _____ Personal Disability Insurance \$ _____

Group Life Insurance \$ _____ Group Disability Insurance \$ _____

Stocks/Bonds/Mutual Funds \$ _____ Loans Due You From Others \$ _____

Other liquid investments \$ _____ Separate Educational Funds \$ _____

Retirement Plan (401(k) etc.) \$ _____

IRAs \$ _____

Business Interest (Liquid) \$ _____

Other (explain) \$ _____

Word Files/Matt/edu data form