

## DIME - Basic Needs Analysis

Agency Name

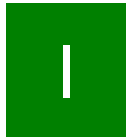
Phone # 814-616-8336



Debt

Debts other than mortgage, credit cards, consumer/auto loans,  
and investment liabilities

\$50,000



Income

Income Replacement

$10 \times \$100,000$   
*Years to Maintain Lifestyle*      *Current Annual Family Income*

(Rule of Thumb 7 to 10 years)

\$1,000,000



Mortgage

Current Mortgage Balance(s)

\$250,000



Expenses

Final expenses, immediate cash, educational costs, long  
term/child care, and charitable donations

\$50,000

### Estimated Life Insurance Needs

*(before subtracting existing Life Insurance)*

\$1,350,000

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Life  
owned

Existing Life Insurance:  
*(not including insurance being replaced)*

\$500,000

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**New Estimated Need\***

**\$850,000**

The new estimated need may help you decide what kind of life insurance is the best fit for you. The check below represents the new estimated need rounded to the next \$5,000 increment based on the dollar amounts you have provided above.

**If you could write your own check...**  
***how much would you leave your family?***

Life insurance issued by:  
Mike Bissell Agency  
1920 E 38th St. Suite A Erie, PA 16510

**Date:** .....

**Pay to the  
Order of:**

Your Beneficiary

\$ 850,000

#NAME?

**Dollars**

**Memo:** The benefit your beneficiary could receive

***Life Insurance***

*Non-Negotiable ~ For Illustrative Purposes Only*