

Level Term Life Insurance Protection Estimator

Funds for Family Capital Needs

Outstanding Mortgage Debt \$ _____

Student Loans & Other Debt to be Repaid \$ _____

Children's Education Fund \$ _____

Other Capital Needs \$ _____

Total \$ _____

Annual After Tax Income to Be Replaced \$ _____

Assumed After Tax Rate of Return (e.g. 4%) ÷ _____ %

Total Investments Needed to Replace Income \$ _____

Total of Capital Needs & Investments to Replace Income \$ _____

Available Current Cash, Investments, and Life Insurance (\$ _____)

Difference* \$ _____

* A positive difference may be an indication that there is a need for additional life insurance protection.

You should design your term life insurance with the appropriate duration to lock in the level premium for as long as the protection is needed by your family, usually 10, 15, 20 or 30 years.

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