

The basic fact finder shows a client where income falls within some of the most important things in their life.

Use the tool below with your client:

- 1) Have them rank the six areas 1 through 6 with 1 being the most important.
- 2) Ask them to put a checkmark beside any item they believe is appropriately insured.
- 3) Review the sheet with them. In over 90% of the cases, Health is #1 and Income is #2. Establish with them the fact that Income is #2, yet the majority of the time, it is not checked as adequately insured.
- 4) Discuss a supplemental disability policy with them and the impact to all other items if their Income is protected

RANK

ADEQUATELY
INSURED



HOME



HEALTH



RETIREMENT



INCOME



CAR



PERSONAL ITEMS
