

How much final expense insurance do I need?

The assessment below can help you decide how much final expense insurance coverage is right for you. Our assessment can assist you to determine how much insurance you may need to help with your family's immediate needs, such as funeral expenses, uninsured medical costs, and legal and accounting fees.

Life insurance needs worksheet

Immediate needs

Final expenses

Costs associated with your burial/funeral \$ _____

Uninsured medical costs + \$ _____

Estate taxes, probate, accounting fees + \$ _____

Household expenses

Food, housing, utilities, transportation, etc. for three months + \$ _____

Available assets

Savings and investments

Bank accounts (checking/savings), money market, CDs, stocks, bonds, mutual funds, annuities, and social security survivor/child benefit - \$ _____

Retirement savings

IRAs, 401(k)s, SEP plans, SIMPLE IRA plans, Keoghs, pensions, and profit sharing plans - \$ _____

Estimated amount of life insurance needed = \$ _____

Amount of Aflac life insurance applied for: = \$ _____

This form is for illustrative purposes and does not guarantee availability of Aflac life insurance. Aflac life insurance policies are underwritten by Tier One Insurance Company. WWHQ | 1932 Wynnton Road | Columbus, GA 31999.