



# Do You Have a Client That Fits Into One of These Areas?

**LONG TERM CARE INSURANCE:** DO YOU HAVE CLIENTS OVER 60?  
ARE THEY WORRIED ABOUT HEALTHCARE COSTS IN RETIREMENT?

## Idle Assets

- CDs
- Money Markets
- Cash Value Life Insurance

## Non-Qualified

- Non-Qualified Annuities
- Cash Value Life Insurance

## Qualified

- IRAs
- 401(k)
- 403(b)

## Cash Flow

- RMDs
- Pension
- Social Security
- Rental Income
- Retirement Income

## CLIENT INFORMATION

### Idle Assets

Name	DOB	State	Smoking Yes/No
1.			
2.			
3.			
4.			
5.			

### Non-Qualified

Name	DOB	State	Smoking Yes/No
1.			
2.			
3.			
4.			
5.			

### Qualified

Name	DOB	State	Smoking Yes/No
1.			
2.			
3.			
4.			
5.			

### Cash Flow

Name	DOB	State	Smoking Yes/No
1.			
2.			
3.			
4.			
5.			