



Client Full Name:

Client DOB:

Client Phone

Client Email:

Client Address:

Spouse Full Name:

Spouse DOB:

Spouse Phone

Spouse Email:

Spouse Address:

DIMEL ANALYSIS

DIMEL Analysis is a formula used to determine how much coverage a family needs. Fill this out and see what your formula is.

	+/-	Mr.	Mrs.
D ebt	+		
I ncome (Multiply annual income by 5 or 10 years)	+		
M ortgage balance to pay off	+		
E ducation (100k per child)	+		
L egacy	+		
F inal Expenses (10-20K)	+		
E xisting Assets Total	-		
E xisting Life Insurance (Excluding Employer Plans)	-		
T otal Need			

Top Financial Agency Client Intake Form

Date				
Client First Name	Client Last Name	DOB	Child Name	Child Age
Spouse First Name	Spouse Last Name	Spouse DOB		

What are some of your goals?			
Financial	Retirement	Legacy	Misc

Monthly Expenses		Montly Income	
Mortgage		Rental Properties	
Utilities		Child support	
Cable/Internet		Social Security	
Phone		Total Income	
Car Payment			
Car Insurance		Discretionary Income	
Gas			
Groceries			
Credit Cards			
Loans			
Subscriptions			
Classes			
Entertainment			
Child Care			
Misc			
Misc			
Misc			
Total Expenses			

Credit Score	Would you like to increase your score?

Person Insured	Carrier Name	Type	Death Benefit	Living Benefits?	Premium Amount

Do you or your family have an expiring term policy and want to learn more about Life Settlement?

Other Protections and Preparations		
Service	Do you have a plan?	Would you like to add or review?
Health Insurance		
Medicare		
Disability Ins.		
Living Benefits		
Trust/Will		
TeleHealth		
Vision		
Dental		
Hospital Indemnity		

Investments Balance	
401k	
Traditional IRA	
Roth IRA	
IUL Cash Value	
Whole Life Cash Value	
Crypto	
Mutual Funds	
Real Estate Equity	
Other	
Other	
Total	

Any health concerns that may prevent you from getting approved for life insurance?

Any bankruptcies, leins, or legal issues that may prevent you from being approved for life insurance?

Demographic Intake

Name of agent that referred you	
Phone number of agent	

Investing Towards Products

Discretionary Income:		How Much Are You Willing to invest into life insurance/investments:	
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When you need life insurance, it's too late. Be prepared because life happens.

Watch this video to learn what the wealthy do:

<https://www.youtube.com/watch?v=wX89Rk5pr6A>

Retirement Planning

At what age do you want to make sure you have enough assets to retire?	
Assuming you're debt free by then, how much money do you want to have monthly to meet your retirement needs?	
What is the longest anyone in your family has ever lived?	

What is important to you for retirement?

Savings Concepts	How important is this from (1-10)?	Do you currently have it?
Market-like returns without market risk?		
Lifetime income options		
Tax free income		
Lawsuit protection plans		
Creditor protection plans		
Savings plans for kids		
Access to money in the event of an emergency		

Other Needs & Solutions

1. Would you like a will or trust? **Y** **N**
2. What's your credit score: _____
 - a. Would you like to raise it? **Y** **N**
3. Do you know a senior with an expiring term policy? **Y** **N**
 - a. If yes, would you like to look into life settlement? (Selling the policy for cash) **Y** **N**
4. Would you like health insurance or medical? **Y** **N**

3 Emergency Contacts

If your policy has living benefits, it's a good idea to have at least 3 emergency contacts to call your life insurance agent or the life insurance company on your behalf to file a claim so you can receive your benefits.

Name	Relationship	Phone Number

It's also recommended we call your beneficiaries to let them know of your benefits and what to do in the case you pass away.

Name	Relationship	Phone Number

Finally, if there's anyone you think would benefit from life insurance or investments, please let us know.

Name	Relationship	Phone Number

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