

FINANCIAL ASSESSMENT:

Equity (in your home): \$ _____

Personal Property: \$ _____

Investments: \$ _____

Savings/Checking: \$ _____

Future Wages: \$ _____

Total Amount You Have At Risk: \$ _____

CURRENT INSURANCE PROTECTION:

Auto Liability:

Gap in Coverage? Yes No

\$ _____

Personal Umbrella Liability

(aka: Personal Excess Liability):

\$ _____

“AT RISK” GAP (What You May Need vs. What You Have)

\$ _____

Personal Liability (Home/Condo/Renters):

\$ _____

Gap in Coverage? Yes No

Personal Umbrella Liability

(aka: Personal Excess Liability):

\$ _____

“AT RISK” GAP (What You May Need vs. What You Have)

\$ _____

CALL ME TO TALK ABOUT WAYS TO FILL THE GAPS!

IF RESPONSIBLE FOR AN ACCIDENT, YOU MAY HAVE TO PAY FOR ...

Property Losses

- Car Damage
- Loss of Use
- Towing
- Car Rental
- Damage to Personal Property
- Damage to Business Property
- Environmental Cleanup

Liability Losses

- Modification to Home
- Pain & Suffering
- Loss of Essential Services
(Lawn, house cleaning, etc.)
- Attorney Fees
- Loss of Wages
- Medical Bills