



**MarketShare[®]
Financial**

PROTECTION PREPAREDNESS QUESTIONNAIRE

A Quick Financial Protection Checkup for Couples

Life insurance isn't about preparing for death—it's about protecting the people you love from financial hardship.

Take a few minutes to answer the questions below.



**Protect today.
Confident for tomorrow.**

1 INCOME PROTECTION



If one of you passed away tomorrow, would the surviving spouse experience a significant loss of income?

- ☐ Yes
☐ No

Annual household income at risk: \$ _____

2 DEBT & MORTGAGE PROTECTION



Do you have any debts that would need to be paid if one spouse passed away?

- ☐ Mortgage
☐ Home Equity Loan
☐ Auto Loans
☐ Credit Cards
☐ Student Loans
☐ Business Debt
☐ Other: _____

3 FAMILY PROTECTION



Do you have children or other dependents who rely on your income?

- ☐ Yes ☐ No

Number of Dependents: _____

Ages: _____

4 SURVIVING SPOUSE SECURITY



Would the surviving spouse have enough savings and assets to maintain their current lifestyle without the deceased spouse's income?

- ☐ Yes, comfortably
☐ Possibly, but finances would be strained
☐ No

5 FUTURE GOALS



Which financial goals would you want protected if one spouse passed away?

- ☐ Children's College Education
☐ Retirement Funding
☐ Paying Off the Mortgage
☐ Leaving an Inheritance
☐ Business Continuation
☐ Charitable Giving
☐ Other: _____



CONFIDENCE SCORE

On a scale of 1–10, how confident are you that your family would be financially secure if one of you passed away unexpectedly?

1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Not Confident

Extremely Confident



YOUR RESULTS

If you answered "Yes" to any of Questions 1–3, selected "Finances Would Be Strained" or "No" in Question 4, or have important goals listed in Question 5, a life insurance review may help identify ways to protect your family's financial future.

WHY IT MATTERS

- ✓ Replace lost income
- ✓ Pay off debts and the mortgage
- ✓ Protect your children's future
- ✓ Maintain your lifestyle
- ✓ Achieve your financial goals
- ✓ Provide peace of mind

Life insurance is one of the most meaningful gifts you can leave behind.



**MarketShare[®]
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Insurance products are offered through MarketShare Financial Group, LLC and its licensed insurance agencies.



Let's start a conversation.

We're here to help you protect what matters most.



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