

## FACT FINDER WORKSHEET

Name \_\_\_\_\_ Resident State \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

1. Have you made plans for keeping your business open and running smoothly if you were unable to work? Yes No
2. How would you pay for utilities, rent, leases, employee salaries and other business expenses? \_\_\_\_\_
3. Who would be available to keep the business going during your extended absence? \_\_\_\_\_
4. Could you easily afford to hire someone to manage your business? Yes No
5. What percentage of the company do you own? \_\_\_\_\_

A Business Overhead Expense DI policy is an economical and tax deductible way to make certain you could pay your business expenses and make it easier to keep your business running if you were disabled.

6. What are your monthly fixed expenses?

Utilities	\$ _____
Rent or Mortgage	\$ _____
Leases – car, equipment, furniture, etc.	\$ _____
Employee salaries and wages	\$ _____
Insurance premiums	\$ _____
Loan payments	\$ _____
Interest on debt	\$ _____
Miscellaneous	\$ _____
<b>Total monthly fixed expenses</b>	<b>\$ _____</b>

Policy Form No. A-D106. Product availability, features and rates may vary by state. This policy may contain reductions of benefits, limitations and exclusions. For costs and complete details of the coverage, please contact your agent, Assurity Life Insurance Company or ask to review the policy for more information.



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