

LIFE INSURANCE NEEDS

Mark Sasko

Do your clients have sufficient life insurance? Are both the Client and Spouse insured? Life Insurance coverage can be calculated in many ways. Below is a quick "Multiple of Earnings" calculation based on your clients' current annual income. We used a quick assumption of a 45 year old client and a 15 times annual income calculation.

The listed results show the potential insurance need of your clients'. Below is a list of clients that have less than 15 times annual income in highest to lowest need order.

Call? Y/N	Client Name	Home Phone	Cell Phone	Email Address	Current Income	Current Death Benefit	Additional Insurance Needed
<input type="checkbox"/>	Bill and Nancy Roberts	(514) 897-1457	(514) 221-2589	nancyr@minspring.com	\$690,000	\$2,500,000	\$7,535,000
<input type="checkbox"/>	Kathleen Wilson	(212) 324-1256	(646) 378-9863	Kwilson59@yahoo.com	\$340,000	\$0	\$5,000,000
<input type="checkbox"/>	Bob and Kathy Lasker	(312) 415-8796	(917) 879-5437	bobl@comcast.net	\$450,000	\$2,000,000	\$4,750,000
<input type="checkbox"/>	Daniel and Maggie Sloan	(413) 697-5287	(609) 218-8976	daniels@aol.com	\$425,000	\$2,556,800	\$3,818,200
<input type="checkbox"/>	Mark and Jenna Maney	(856) 897-3425	(856) 342-5463	mjmaney@comcast.net	\$228,800	\$0	\$3,432,000
<input type="checkbox"/>	Andrew and Eileen Silverman	(609) 362-8736	(856) 345-9822	andrews@bellsouth.net	\$301,000	\$1,200,000	\$3,315,000
<input type="checkbox"/>	Joshua and Carolyn Rosen	(610) 456-8767	(346) 236-6789	joshrosen@rosenlaw.com	\$273,000	\$1,000,000	\$3,098,000
<input type="checkbox"/>	Madeleine and Mark Simpson	(212) 789-3512	(212) 371-3864	maddie@yahoo.com	\$430,000	\$3,250,000	\$3,200,000
<input type="checkbox"/>	Stephen and Mary Donahue	(215) 430-9821	(215) 365-9572	sdonahue@home.com	\$273,000	\$1,000,000	\$3,098,000
<input type="checkbox"/>	Russell and Debbie Smith	(618) 258-6542	(856) 567-9857	debs@verizon.com	\$182,000	\$250,000	\$2,480,000
<input type="checkbox"/>	David and Carol Casey	(215) 784-9845	(267) 455-8976	caseydc@comcast.net	\$176,000	\$1,200,000	\$1,440,000
<input type="checkbox"/>	Keith and Margo Klein	(609) 245-6879	(847) 359-7985	mklein@sbcglobal.net	\$90,000	\$250,000	\$1,100,000
<input type="checkbox"/>	John and Anita Hannigan	(610) 684-3244	(267) 265-1123	johnanita25@yahoo.com	\$100,000	\$500,000	\$1,000,000
<input type="checkbox"/>	Thomas and Sharon D'Angelo	(212) 344-6742	(212) 983-9003	dangelots@wellnesscenter.com	\$164,000	\$1,500,000	\$960,000

TOTAL BENEFIT NEED POTENTIAL
\$44,226,200

Please remember that this is a quick look report identifying opportunities from your book of business. You should follow up and confirm all details within each client fact finder prior to contact.

DISABILITY NEEDS

Mark Sasko

Disability insurance replaces a portion of your clients' income when they are unable to work because of injury or illness. Normal industry standards suggest on replacing at least 60% of your clients' salary or preferably 80% if they can afford the additional coverage.

The listed results below show the potential disability insurance need of your clients' that have less than 60% of their annual income covered in highest to lowest need order.

Call? Y/N	Client Name	Home Phone	Cell Phone	Email Address	Current Monthly Income	Current Monthly Disability	Additional Disability Needed
<input type="checkbox"/>	Bill and Nancy Roberts	(514) 897-1457	(514) 221-2589	nancyr@minspring.com	\$57,500	\$17,000	\$17,500
<input type="checkbox"/>	Richard and Sarah Lords	(215) 654-8954	(215) 230-7867	sarahl@sbcglobal.net	\$45,500	\$10,167	\$17,133
<input type="checkbox"/>	Bob and Kathy Lasker	(312) 415-8796	(917) 879-5437	bobl@comcast.net	\$35,417	\$6,300	\$14,950
<input type="checkbox"/>	Madeleine and Mark Simpson	(212) 789-3512	(212) 371-3864	maddie@yahoo.com	\$57,579	\$20,000	\$14,548
<input type="checkbox"/>	Tom and Lonnie Skone	(245) 345-8796	(245) 657-8975	lonnie@verizon.com	\$26,177	\$4,000	\$11,706
<input type="checkbox"/>	Daniel and Maggie Sloan	(413) 697-5287	(609) 218-8976	daniels@aol.com	\$29,167	\$6,000	\$11,500
<input type="checkbox"/>	Russell and Debbie Smith	(618) 258-6542	(856) 567-9857	debs@verizon.com	\$15,166	\$0	\$9,099
<input type="checkbox"/>	David and Carol Casey	(215) 784-9845	(267) 455-8976	caseydc@comcast.net	\$14,666	\$3,500	\$7,060
<input type="checkbox"/>	Mary and Robert Dell	(917) 895-2451	(917) 457-8965	robertd@yahoo.com	\$16,667	\$2,800	\$7,200
<input type="checkbox"/>	Evan and Connie Lewis	(858) 354-2675	(858) 415-6534	clewis@yahoo.com	\$27,083	\$10,500	\$5,750
<input type="checkbox"/>	Thomas and Sharon D'Angelo	(212) 344-6742	(212) 983-9003	dangelots@wellnesscenter.com	\$13,666	\$2,500	\$5,700
<input type="checkbox"/>	John and Anita Hannigan	(610) 684-3244	(267) 265-1123	johnanita25@yahoo.com	\$8,333	\$0	\$5,000
<input type="checkbox"/>	Warren and Carey Fox	(610) 322-8746	(610) 786-8278	Warrenfox34@toll.com	\$11,126	\$2,000	\$4,676

TOTAL DISABILITY NEED POTENTIAL
\$136,322

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INSURANCE PREMIUM DUE

Mark Sasko

It is always a good practice to make sure your clients' insurance is up-to-date. When is a good time for an insurance review? An excellent time to show your clients a fresh look of their current coverages and risks is right before the due date for the policy premium.

The results listed below are showing client and policy information of any insurance premiums due within the next 120 days. The results are listed in date order starting with upcoming premiums due.

Call? Y/N	Client Name	Home Phone	Cell Phone	Email Address	Insurance Name	Due Date
<input type="checkbox"/>	Bill and Nancy Roberts	(514) 897-1457	(514) 221-2589	nancyr@minspring.com	Mass Mutual Universal Life Policy - 87653	5/1/08
<input type="checkbox"/>	John and Anita Hannigan	(610) 684-3244	(267) 265-1123	johnanita25@yahoo.com	Prudential Whole Life Policy - PA679001	5/1/08
<input type="checkbox"/>	Bob and Kathy Lasker	(312) 415-8796	(917) 879-5437	bobl@comcast.net	NY Life 20 Year Term Policy - 76329	5/8/08
<input type="checkbox"/>	Stephen and Mary Donahue	(215) 430-9821	(215) 365-9572	sdonahue@home.com	MET VUL Policy- 23789283	5/9/08
<input type="checkbox"/>	Bruce Carter	(610) 489-9834	(610) 783-9112	bruceec67@aol.com	Mass Mutual VUL Policy - 87234	5/10/08
<input type="checkbox"/>	Madeleine and Mark Simpson	(212) 789-3512	(212) 371-3864	maddie@yahoo.com	Liberty Whole Life Policy - 1428890	5/11/08
<input type="checkbox"/>	Daniel and Maggie Sloan	(413) 697-5287	(609) 218-8976	daniels@aol.com	Prudential Universal Life Policy - 763232	5/15/08
<input type="checkbox"/>	Warren and Carey Fox	(610) 322-8746	(610) 786-8278	Warrenfox34@toll.com	MET Whole Life Policy- 238923-	5/15/08
<input type="checkbox"/>	Russell and Debbie Smith	(618) 258-6542	(856) 567-9857	debs@verizon.com	Mass Mutual VUL Policy - 54378	5/18/08
<input type="checkbox"/>	Keith and Margo Klein	(609) 245-6879	(847) 359-7985	mklein@sbcglobal.net	Mass Mutual VUL Policy - 89756	5/19/08
<input type="checkbox"/>	David and Carol Casey	(215) 784-9845	(267) 455-8976	caseydc@comcast.net	AIG Disability Policy - DI789065	6/1/08
<input type="checkbox"/>	Andrew and Eileen Silverman	(609) 362-8736	(856) 345-9822	andrews@bellsouth.net	AIG Whole Life Policy - 00087231	6/14/08
<input type="checkbox"/>	Evan and Connie Lewis	(858) 354-2675	(858) 415-6534	clewis@yahoo.com	Colony 15 Year Term Policy - 76548	6/20/08
<input type="checkbox"/>	Sherry and John Matthews	(614) 258-4652	(973) 513-2678	smatthews@aol.com	Provident Disability Policy - 897654	6/20/08

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PRODUCT ANNIVERSARIES

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When is a good time to provide clients a product review? What better time to show your clients the benefit of a product than right before a current product they hold is now about to renew.

The results listed below are showing client and policy anniversary information of any product due to renew within the next 90 days. The results are listed in date order starting with upcoming anniversaries first.

Call? Y/N	Client Name	Home Phone	Cell Phone	Email Address	Insurance Name	Anniversary Date
<input type="checkbox"/>	Bill and Nancy Roberts	(514) 897-1457	(514) 221-2589	nancyr@minspring.com	Guardian Whole Life Policy – 34567	4/20/08
<input type="checkbox"/>	Bob and Kathy Lasker	(312) 415-8796	(917) 879-5437	bobl@comcast.net	AIG 10 Year Term Policy - 7685409	4/20/08
<input type="checkbox"/>	Chris and Frances Quinn	(215) 893-2345	(215) 477-8734	christopherQ@waterworks.com	Mass Mutual Whole Life Policy – 000872345	4/23/08
<input type="checkbox"/>	Allison Parks	(856) 851-1129	(856) 627-6773	amparks@jfkhospital.com	Guardian 15 Year Term Policy – 9823657	4/28/08
<input type="checkbox"/>	Madeleine and Mark Simpson	(212) 789-3512	(212) 371-3864	maddie@yahoo.com	Liberty Whole Life Policy - 67894	5/1/08
<input type="checkbox"/>	Daniel and Maggie Sloan	(413) 697-5287	(609) 218-8976	daniels@aol.com	Mass Mutual VUL Policy - 896743	5/1/08
<input type="checkbox"/>	Mark and Joan Mitchell	(215) 435-1265	(267) 655-3670	Jmmitchell3@verizon.com	AIG Term to 65 Policy - 00129847	5/12/08
<input type="checkbox"/>	Russell and Debbie Smith	(618) 258-6542	(856) 567-9857	debs@verizon.com	Mass Mutual VUL Policy – 678954	5/1/08
<input type="checkbox"/>	Keith and Margo Klein	(609) 245-6879	(847) 359-7985	mklein@sbcglobal.net	NY Life Universal Life Policy – 4789	5/15/08
<input type="checkbox"/>	Peter and Lisa Cassidy	(610) 784 – 1259	(610) 966-4320	petercassidy@dentalmax.com	AIG Whole Life Policy – 9372460	5/16/08
<input type="checkbox"/>	Evan and Connie Lewis	(858) 354-2675	(858) 415-6534	clewis@yahoo.com	NY Life Universal Life Policy - 6754	5/15/08
<input type="checkbox"/>	Sherry and John Matthews	(614) 258-4662	(973) 513-2678	smatthews@aol.com	Colony Whole Life Policy – 78965	5/30/08
<input type="checkbox"/>	Doug and Maria Kelly	(610) 355-8967	(610) 684 -2349	dougkelly@chrysler.com	Prudential VUL Policy – BA879237	6/2/08

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EXCESS CASH BALANCE

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Cash balances should never be under-employed. Reviewing the client cash balances within explicit guidelines and a framework designed to protect capital is best practice. As the client's trusted advisor, you may look to put that money to work or make sure it is earning the highest possible return based on the client's risk tolerances.

The listed results below show clients with cash values which exceed 10% of their total investment portfolio. This is represented in a percent of total in highest to lowest order.

Call? Y/N	Client Name	Home Phone	Cell Phone	Email Address	Current Cash Value	Portfolio Cash Percentage
<input type="checkbox"/>	Sue and Bill Rogers	(867) 965-8479	(867) 483 -5512	suer@minspring.com	\$653,602	47.24%
<input type="checkbox"/>	Mike and Debbie Mackinnon	(847) 645-8795	(847) 789-4512	mikem@comcast.net	\$359,375	43.03%
<input type="checkbox"/>	Sharon and Lauren Tasker	(203) 654-2154	(203) 651-4322	sharont@yahoo.com	\$263,584	40.97%
<input type="checkbox"/>	John and Anita Hannigan	(610) 684-3244	(267) 265-1123	johnanita25@yahoo.com	\$34,890	37.13%
<input type="checkbox"/>	Mark and Joan Mitchell	(215) 435-1265	(267) 655-3670	Jmmitchell3@verizon.com	\$154,350	36.56%
<input type="checkbox"/>	Dianne and Roger Barron	(207) 518-7954	(207) 218-8976	rogerb@aol.com	\$433,510	29%
<input type="checkbox"/>	Tom and Lonnie Skone	(245) 345-8796	(245) 657-8975	lonnie@verizon.com	\$196,140	24.24%
<input type="checkbox"/>	Allison Parks	(856) 851-1129	(856) 627-6773	amparks@jfkhospital.com	\$39,540	23.33%
<input type="checkbox"/>	Peter and Lisa Cassidy	(610) 784 – 1259	(610) 966-4320	petercassidy@dentalmax.com	\$84,350	19.75%
<input type="checkbox"/>	Thomas and Sharon D'Angelo	(212) 344-6742	(212) 983-9003	dangelots@wellnesscenter.com	\$57,802	19%
<input type="checkbox"/>	Richard and Sarah Lords	(215) 654-8954	(215) 230-7867	sarahl@sbcglobal.net	\$340,602	18%
<input type="checkbox"/>	Mary and Robert Dell	(917) 895-2451	(917) 457-8965	robertd@yahoo.com	\$569,610	16.16%
<input type="checkbox"/>	Jacinta and Jack Keller	(513) 352-8579	(513) 352-8942	jjkeller@aol.com	\$144,285	15.04%
<input type="checkbox"/>	Chris and Frances Quinn	(215) 893-2345	(215) 477-8734	christopherQ@waterworks.com	\$67,720	14.33%

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OPTION VESTS

Mark Sasko

Do any of your clients have stock options? Another opportunity to provide your clients with proactive service is by being aware of their specific lots or grants that are about to vest in their stock option plan. Making the client aware by inquiring on their stock option plan is the first step toward you offering a solution for these proceeds.

Below is a list of clients who have options set to vest in the next 60 days. The results are listed in date order starting with upcoming vesting first.

Call? Y/N	Client Name	Home Phone	Cell Phone	Email Address	Asset Name	Grant Number	Vest Date
<input type="checkbox"/>	Sue and Bill Rogers	(867) 965-8479	(867) 483 -5512	suer@minspring.com	Lehman ISO	003412	4/1/08
<input type="checkbox"/>	Mike and Debbie Mackinnon	(847) 645-8795	(847) 789 4512	mikem@comcast.net	ADP Restricted	008976	4/1/08
<input type="checkbox"/>	Sharon and Lauren Tasker	(203) 654-2154	(203) 651-4322	sharont@yahoo.com	Apple NQL	004352	4/1/08
<input type="checkbox"/>	Glenn and Lori Allen	(215) 499-7282	(267) 238-7399	Lorih3@yahoo.com	IBM ISO	8923699	4/15/08
<input type="checkbox"/>	Dianne and Roger Barron	(207) 518-7954	(207) 218-8976	rogerb@aol.com	General Mills NQL	000001245	4/15/08
<input type="checkbox"/>	Tom and Lonnie Skone	(245) 345-8796	(245) 657 8975	lonnie@verizon.com	General Mills ISO	000001389	4/15/08
<input type="checkbox"/>	Doug and Maria Kelly	(610) 355-8967	(610) 684 -2349	dougkelly@chrysler.com	Daimler Chrysler	4567839	4/30/08
<input type="checkbox"/>	Richard and Sarah Lords	(215) 654-8954	(215) 230-7867	sarahl@sbcglobal.net	Yahoo Restricted	000001387	4/30/08
<input type="checkbox"/>	Mary and Robert Dell	(917) 895-2451	(917) 457 8965	robertd@yahoo.com	Goldman Sachs Restricted	98706	5/30/08
<input type="checkbox"/>	Jacinta and Jack Keller	(513) 352-8579	(513) 352-8942	jjkeller@aol.com	Goldman Sachs ISO	98765	5/30/08
<input type="checkbox"/>	John and Anita Hannigan	(610) 684-3244	(267) 265-1123	johnanita25@yahoo.com	XM Satellite Radio Restricted	293740	5/30/08
<input type="checkbox"/>	Mark and Joan Mitchell	(215) 435-1265	(267) 655-3670	Jmmitchell3@verizon.com	Sunoco NQ	827739	5/30/08
<input type="checkbox"/>	Bruce Carter	(610) 489-9834	(610) 783-9112	brucec67@aol.com	Home Depot NQ	987237	6/30/08
<input type="checkbox"/>	Warren and Carey Fox	(610) 322-8746	(610) 786-8278	Warrenfox34@toll.com	Toll Brothers Restricted	11245	6/30/08

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OPTION EXPIRES

Mark Sasko

Do any of your clients have stock options? Another opportunity to provide your clients with proactive service is by being aware of their specific lots or grants that are about to expire in their stock option plan. Making the client aware by inquiring on their stock option plan is the first step toward you offering a solution for these proceeds.

Below is a list of clients who have options set to expire in the next 60 days. The results are listed in date order starting with upcoming expirations first.

Call? Y/N	Client Name	Home Phone	Cell Phone	Email Address	Asset Name	Grant Number	Expiration Date
<input type="checkbox"/>	Sue and Bill Rogers	(867) 965 8479	(867) 483 -5512	suer@minspring.com	Lehman ISO	003325	4/18/08
<input type="checkbox"/>	Mike and Debbie Mackinnon	(847) 645-8795	(847) 789-4512	mikem@comcast.net	ADP Restricted	007865	4/23/08
<input type="checkbox"/>	Sharon and Lauren Tasker	(203) 654-2154	(203) 651-4322	sharont@yahoo.com	Apple NQL	004567	4/30/08
<input type="checkbox"/>	Dianne and Roger Barron	(207) 518-7954	(207) 218-8976	rogerb@aol.com	General Mills NQL	0000065293	5/15/08
<input type="checkbox"/>	Glenn and Lori Allen	(215) 499-7282	(267) 238-7399	Lorih3@yahoo.com	IBM ISO	7986634	5/15/08
<input type="checkbox"/>	Tom and Lonnie Skone	(245) 345-8796	(245) 657-8975	lonnie@verizon.com	General Mills ISO	000003214	5/18/08
<input type="checkbox"/>	Richard and Sarah Lords	(215) 654-8954	(215) 230-7867	sarahl@sbcglobal.net	Yahoo Restricted	007893210	6/5/08
<input type="checkbox"/>	Mary and Robert Dell	(917) 895-2451	(917) 457-8965	robertd@yahoo.com	Goldman Sachs NQ	32651	6/12/08
<input type="checkbox"/>	Jacinta and Jack Keller	(513) 352-8579	(513) 352-8942	jjkeller@aol.com	Goldman Sachs ISO	89652	6/25/08
<input type="checkbox"/>	Mark and Joan Mitchell	(215) 435-1265	(267) 655-3670	Jmmitchell3@verizon.com	Sunoco NQ	323235	6/25/08
<input type="checkbox"/>	Bruce Carter	(610) 489-9834	(610) 783-9112	brucec67@aol.com	Home Depot NQ	1413414	6/30/08
<input type="checkbox"/>	Joe and Melissa Thomas	(856) 354-9482	(609) 239 -2379	joet@suntrust.com	Sun Trust Banks Restricted	92900338	6/30/08
<input type="checkbox"/>	Matthew and Debb Bell	(215) 873-2382	(215) 732- 3723	mbell@verizon.net	Apple NQL	809237	7/1/08
<input type="checkbox"/>	Warren and Carey Fox	(610) 322-8746	(610) 786-8278	Warrenfox34@toll.com	Toll Brothers Restricted	2562722	7/1/08

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EXCESSIVE CREDIT CARD DEBT

Mark Sasko

Excessive credit card debt is always a difficult conversation to have with clients. This list is showing clients with credit card debt exceeding 20% of their total debt. You may want to use this information as a way for you to understand your client's situation better.

Call? Y/N	Client Name	Home Phone	Cell Phone	Email Address	Credit Card Debt	CC Total Debt Percentage
<input type="checkbox"/>	Linda Bailey	(215) 673-8976	(267) 236-2374	lbailey@home.com	(\$25,780)	33.67%
<input type="checkbox"/>	Derek and Danielle Castleton	(609) 782-4872	(609) 398-8411	ddcastle@comcast.net	(\$21,897)	30.15%
<input type="checkbox"/>	Connor and Mary Parker	(856) 459-1276	(856) 993-4842	mpluvs2run@verizon.com	(\$17,934)	26.78%
<input type="checkbox"/>	Sara Daniels	(610) 345-9786	(610) 673-8474	sarad@att.net	(\$7,623)	24.56%
<input type="checkbox"/>	Eric and Angela Russo	(215) 239-4832	(215) 948-2547	arusso@designsource.com	(\$27,900)	22.43%

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NET WORTH RANKING REPORT

Mark Sasko

Measuring your client's net worth is the first step to increasing their net worth. Net worth refers to the value of all assets in their estate minus the value of all liabilities in their estate. It is simply your client's net financial position.

The results listed below are showing your client's information and net worth listed in order of value starting from highest to lowest.

Call? Y/N	Client Name	Home Phone	Cell Phone	Email Address	Client/Spouse Age	Net Worth
<input type="checkbox"/>	Bill and Nancy Roberts	(514) 897-1457	(514) 221-2589	nancyr@minspring.com	63/61	\$12,759,987
<input type="checkbox"/>	Bob and Kathy Lasker	(312) 415-8796	(917) 879-5437	bobl@comcast.net	58/54	\$10,874,231
<input type="checkbox"/>	Madeleine and Mark Simpson	(212) 789-3512	(212) 371-3864	maddie@yahoo.com	42/44	\$9,432,987
<input type="checkbox"/>	Daniel and Maggie Sloan	(413) 697-5287	(609) 218-8976	daniels@aol.com	56/45	\$8,344,982
<input type="checkbox"/>	Kathleen Wilson	(212) 324-1256	(646) 378-9863	Kwilson59@yahoo.com	43	\$5,432,964
<input type="checkbox"/>	Andrew and Eileen Silverman	(609) 362-8736	(856) 345-9822	andrews@bellsouth.net	45/44	\$5,178,423
<input type="checkbox"/>	Joshua and Carolyn Rosen	(610) 456-8767	(346) 236-6789	joshrosen@rosenlaw.com	66/62	\$4,567,232
<input type="checkbox"/>	Stephen and Mary Donahue	(215) 430-9821	(215) 365-9572	sdonahue@home.com	42/38	\$4,198,898
<input type="checkbox"/>	Mark and Jenna Maney	(856) 897-3425	(856) 342-5463	mjmaney@comcast.net	38/37	\$2,984,484
<input type="checkbox"/>	David and Carol Casey	(215) 784-9845	(267) 455-8976	caseydc@comcast.net	52/51	\$2,723,544
<input type="checkbox"/>	Russell and Debbie Smith	(618) 258-6542	(856) 567-9857	debs@verizon.com	56/49	\$2,450,783
<input type="checkbox"/>	Richard and Sarah Lords	(215) 654-8954	(215) 230-7867	sarahl@sbcglobal.net	46/39	\$1,235,987
<input type="checkbox"/>	Tom and Lonnie Skone	(245) 345-8796	(245) 657-8975	lonnie@verizon.com	38/37	\$1,078,982
<input type="checkbox"/>	Mary and Robert Dell	(917) 895-2451	(917) 457-8965	robertd@yahoo.com	63/65	\$988,232
<input type="checkbox"/>	Evan and Connie Lewis	(858) 354-2675	(858) 415-6534	clewis@yahoo.com	36/35	\$867,453

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