

QUESTIONNAIRE**Key person****Key question:**

If a key person dies, will the business suffer financially?

(complete for each key person)

Name: _____

Current position: _____ Current salary: _____

Age: _____ Retirement age: _____

Directional questions**Which of the following would be impacted by the death of a key person?**

- | | | |
|--|---|--------------------------------------|
| <input type="checkbox"/> Client/customer relationships | <input type="checkbox"/> Industry knowledge | <input type="checkbox"/> Sales |
| <input type="checkbox"/> Management of the business | <input type="checkbox"/> Specialized skills | <input type="checkbox"/> Other _____ |

What would it cost to replace a key employee or the revenue he or she generates? \$ _____**The key person death benefit coverage will be:**

- ☐ All for the business – nothing to key person
- ☐ Split coverage for both business and key person (_____ % business _____ % key person)

Will the key person coverage be combined with an executive benefit? ☐ Yes ☐ No

Please keep in mind that the primary reason to purchase a life insurance product is the death benefit.

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