

Annotated Report Guide for...

Disability Income Needs Analysis

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- 1 Your client's current goal coverage.
- 2 Total months for the disability period.
- 3 Total projected needs during the entire disability period.
- 4 This chart shows total outflows in blue (which may include needs entered in plan, liability payments, insurance premiums) compared to their inflows in green (which may include earned income of the non-disabled client, disability benefits, withdrawal from assets, or investment income.) The shortfall is the red that may be solved by either purchasing more disability insurance, or increasing their capital.

