DAPHNE A. WRIGHT, CPA, CFP®
Financial Consulting & Wealth Planning

Long Term Care

Needs Analysis

Organizing your Financial Life

Securities and Advisory Services offered through LPL Financial, A Registered Investment Advisor, Member FINRA & SIPC

Family Information

Client Name:	**Date of Birth: / /**	**Marital Status:**
Spouse Name:	**Date of Birth: / /**	
Address:		
City:	**State:**	**Zip:**
Home Phone:	**Fax:**	
Client Cell Phone:	**Spouse Cell Phone:**	
Client Email:		

Long Term Care Insurance

	Long Term Care 1	Long Term Care2
Policy Name		
Insured		
Benefit Amount/Frequency		
Annual Premium		

Expenses

Current	Retirement	Desired Income in the Event of Death:	
		Client's Death	Spouse's Death