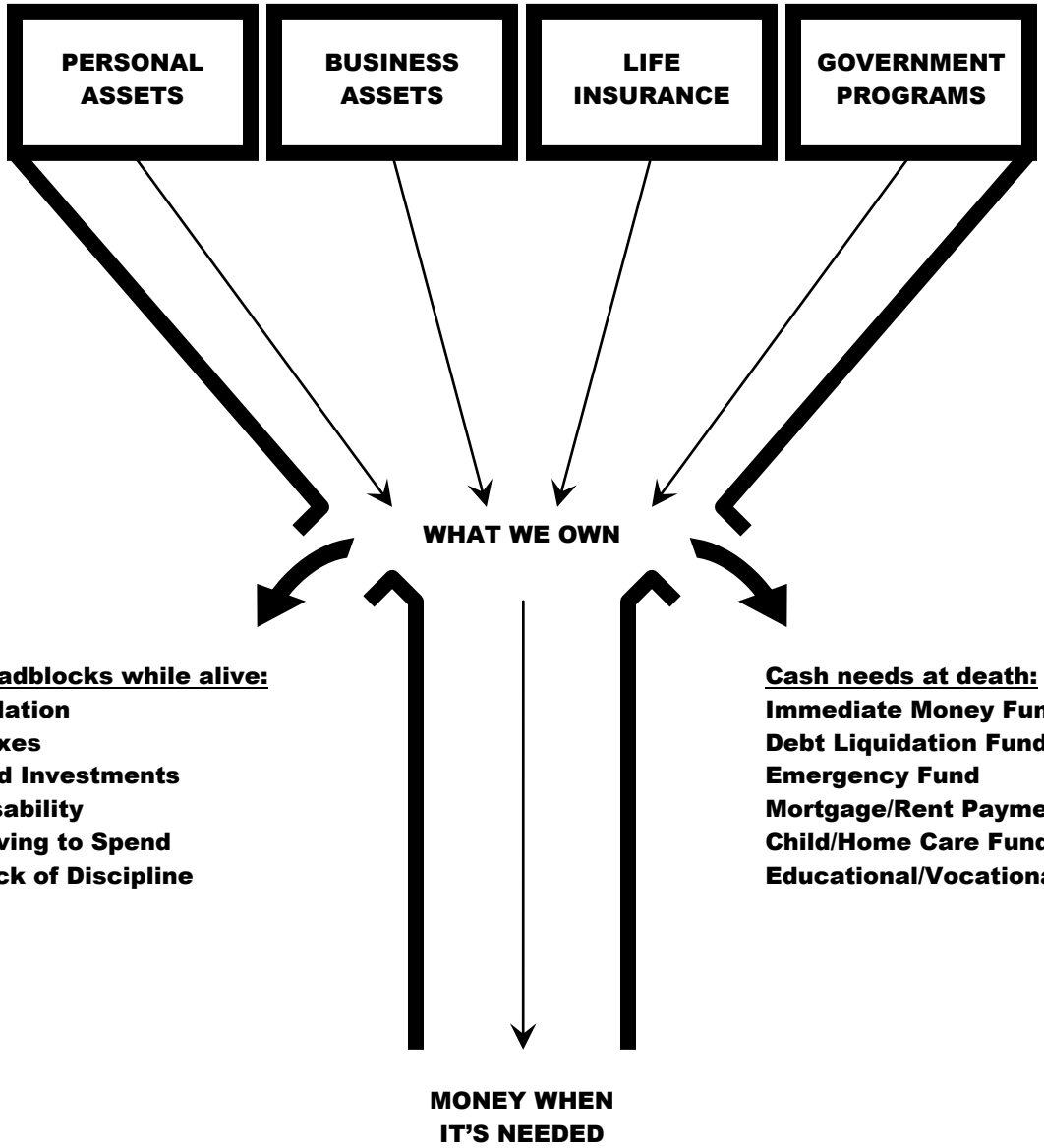
Financial Need Analysis

...to lay the foundation for our future financial security



Roadblocks while alive:

- Inflation
- Taxes
- Bad Investments
- Disability
- Saving to Spend
- Lack of Discipline

Cash needs at death:

- Immediate Money Fund
- Debt Liquidation Fund
- Emergency Fund
- Mortgage/Rent Payment Fund
- Child/Home Care Fund
- Educational/Vocational Fund