



Assets At Risk Worksheet

What is your Net Worth?

(market value minus debt)

Property (home, rentals, valuables, furnishings, electronics, etc.)

\$ _____

Vehicles

\$ _____

Boat/Yacht

\$ _____

Financials (income, investments, savings, cash, future income, IRA's, inheritance, etc.)

\$ _____

TOTAL NET WORTH

\$ _____

Current Insurance Protection

Example -300,000

Home/Auto/Boat Liability Limit
(Use the lowest policy limit)

(\$ _____)

Current Umbrella Limit

(\$ _____)

NET WORTH AT RISK

\$ _____

How Much Coverage Do I Need?

In today's litigious society you don't have to be a millionaire to be sued like one. With the large court judgements being awarded these days along with defense cost, an umbrella policy of 2 x's your total assets is recommended. This coverage is an inexpensive option to protect against a worse case scenario.

