



Assets At Risk Worksheet

What are you assets?

(market value less debt expected over the next 12 months)

Property:

(home, vehicles, business, boat, etc.)

\$ _____

Belongings:

(valuables, furnishings, electronics, other equipment, etc.)

\$ _____

Financials:

(income, investments, savings, cash, retirement, future income, inheritance, etc.)

\$ _____

a. TOTAL ASSETS AT RISK:

\$ _____

Current Insurance Protection

Enter as negative

b. Personal Liability (Home/Condo/Renters)

(\$ _____)

c. Auto, RV Liability

(\$ _____)

d. Boat/Yacht Liability

(\$ _____)

e. Umbrella

(\$ _____)

Home Lawsuit Risk (a-b-e)

\$ _____

Auto Lawsuit Risk (a-c-e)

\$ _____

Boat/Yacht Lawsuit Risk (a-d-e)

\$ _____

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.

