

PAST, PRESENT & FUTURE NEEDS WORKSHEET

Name _____

① NET SETTLEMENT PROCEEDS

Settlement Total	\$	<input type="text"/>		\$	<input type="text"/>
				Settlement Total	
				-	
Liens	\$	<input type="text"/>			
Fees	\$	<input type="text"/>	+	\$	<input type="text"/>
Case Expenses	\$	<input type="text"/>	+	Total Deductions	
Lawsuit Loans	\$	<input type="text"/>	+	=	
			=		
Total Deductions	\$	<input type="text"/>		\$	<input type="text"/>
				NET SETTLEMENT PROCEEDS	

② PAST NEEDS

Mortgage	\$	<input type="text"/>	
			+
Auto Loans	\$	<input type="text"/>	
			+
Student Loans	\$	<input type="text"/>	
			+
Personal Loans	\$	<input type="text"/>	
			+
Credit Cards	\$	<input type="text"/>	
			+
Other Debts	\$	<input type="text"/>	
			=
		<input type="text"/>	
			TOTAL DEBTS

③ PRESENT NEEDS

Income Replacement	\$	<input type="text"/>	+
Home Improvement	\$	<input type="text"/>	+
Emergency Reserves	\$	<input type="text"/>	+
Medical Procedures	\$	<input type="text"/>	+
Immediate Tuition	\$	<input type="text"/>	+
New Home / Car	\$	<input type="text"/>	+
			=
Insurance	\$	<input type="text"/>	
		<input type="text"/>	
			TOTAL CASH

④ FUTURE NEEDS

①	②	③
NET PROCEEDS	- TOTAL DEBTS	- TOTAL CASH
	=	
	FUNDS TO ALLOCATE	
	<input type="text"/>	

Income Replacement	\$	<input type="text"/>		\$	<input type="text"/>	Career Change / New Business
Future College Tuition	\$	<input type="text"/>	+	\$	<input type="text"/>	Vacation Fund
Real Estate Taxes	\$	<input type="text"/>		\$	<input type="text"/>	Estate Planning
			=			
				STRUCTURED SETTLEMENT NEED (DISTRIBUTION PORTFOLIO)		
				<input type="text"/>		

FUNDS TO ALLOCATE		STRUCTURED SETTLEMENT		GROWTH PORTFOLIO
\$	<input type="text"/>	-	\$	<input type="text"/>
		=		
				Investment Needs Retirement (72+)