

Life Insurance Rule of Thumb

THE RULE OF THUMB FOR INSURANCE NEED IS:

$$\text{DEATH BENEFIT} = (10 \text{ to } 20) \times \text{ANNUAL INCOME}$$

We primarily use term insurance. The use-cases for permanent life insurance are very rare and should be discussed with **Tyler Williamson**.

Advisors may loop in **Eric Stuart** on insurance products
(commissions are shared with Allegis when Eric runs with the case)

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