People-First Family Protection Worksheet

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Start with the people you want to protect.

Type into the fields and save a copy, or print this worksheet and write by hand.
Use reasonable estimates. You can revise them as your family's needs change.

Person 1

NAME | **HOW LONG MAY SUPPORT BE NEEDED?** | **MONTHLY SUPPORT COST**

WHAT DOES THIS PERSON RELY ON YOU FOR?

Person 2

NAME | **HOW LONG MAY SUPPORT BE NEEDED?** | **MONTHLY SUPPORT COST**

WHAT DOES THIS PERSON RELY ON YOU FOR?

Person 3

NAME | **HOW LONG MAY SUPPORT BE NEEDED?** | **MONTHLY SUPPORT COST**

WHAT DOES THIS PERSON RELY ON YOU FOR?

Person 4

NAME | **HOW LONG MAY SUPPORT BE NEEDED?** | **MONTHLY SUPPORT COST**

WHAT DOES THIS PERSON RELY ON YOU FOR?

General education only. This worksheet does not determine coverage needs or provide financial, insurance, tax, legal, medical, or benefits advice.

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Add more people, then look at the family picture.

Include children, a spouse or partner, parents, relatives, or anyone who depends on you.
Consider the income, time, care, transportation, and daily support you provide.

Person 5

NAME | **HOW LONG MAY SUPPORT BE NEEDED?** | **MONTHLY SUPPORT COST**

WHAT DOES THIS PERSON RELY ON YOU FOR?

Person 6

NAME | **HOW LONG MAY SUPPORT BE NEEDED?** | **MONTHLY SUPPORT COST**

WHAT DOES THIS PERSON RELY ON YOU FOR?

Family summary

TOTAL MONTHLY SUPPORT | **SAVINGS OR EXISTING COVERAGE TO CONSIDER**

MAJOR FUTURE NEEDS OR EXPENSES TO REMEMBER

The question this worksheet helps you ask

What would help the people I love remain safe and stable?

QUESTIONS OR NOTES FOR A FUTURE CONVERSATION

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