



QUESTIONNAIRE

Key Person Fact Finder

Key question:

If a key person dies, will the business suffer financially?

(complete for each key person)

Name: _____

Current position: _____ Current salary: _____

Age: _____ Retirement age: _____

Directional questions

Which of the following would be impacted by the death of a key person?

- Client/customer relationships Industry knowledge Sales
 Management of the business Specialized skills Other _____

What would it cost to replace a key employee or the revenue he or she generates? \$ _____

The key person death benefit coverage will be:

- All for the business – nothing to key person
 Split coverage for both business and key person (_____ % business _____ % key person)

Will the key person coverage be combined with an executive benefit? Yes No

