

PROPERTY & CASUALTY ANALYSIS

**LEVEL FOUR**

Financial

A DIVISION OF
LEVEL FOUR GROUP, LLC

Prepared For: _____

Date: _____

Current Automobile(s)

Year	Make	Model	VIN #	Mileage	Value
					\$
					\$
					\$
					\$

Current Automobile Coverage

Bodily Injury	Each Person	\$
	Each Accident	\$
Property Damage	Each Accident	\$

Uninsured/Underinsured Motorists

Bodily Injury	Each Person	\$
	Each Accident	\$
Property Damage	Each Accident	\$

Current Home and Property Value

Primary Residence	Address	
	Value	\$
Additional Property		\$
		\$

Current Home and Property Coverage

Dwelling	\$
Other Structures	\$
Personal Property	\$
Personal Liability	\$
Medical to Others	\$
Home Computer	\$
Jewelry	\$
	\$
	\$

866.834.1040 | WWW.LEVELFOURFINANCIAL.COM

Securities offered through Level Four Financial, LLC Member FINRA/SIPC. Advisory services offered through Level Four Advisory Services, LLC, an SEC-registered investment adviser. Insurance services offered through Level Four Insurance Agency, LLC. Level Four Financial, LLC, Level Four Advisory Services, LLC, and Level Four Insurance Agency, LLC are independent entities. Level Four Group, LLC is a division of CRI Capital Group, LLC, a subsidiary of CRI Advisors, LLC. "CRI" is the brand name under which Carr, Riggs & Ingram, L.L.C. ("CPA Firm") and CRI Advisors, LLC ("Advisors") and its subsidiary entities provide professional services. CPA Firm and Advisors (and its subsidiary entities) practice as an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations and professional standards. CPA Firm is a licensed independent CPA firm that provides attest services to its clients, and Advisors and its subsidiary entities provide tax and business consulting services to their clients. Advisors and its subsidiary entities are not licensed CPA firms.

PROPERTY & CASUALTY ANALYSIS

Date: _____

Current Umbrella Insurance Coverage

Personal Liability	\$
--------------------	----

Required Minimum Liability Limits for Underlying Policies

Auto & Other Vehicles	Each Person	\$
	Each Accident	\$
	Property Damage	\$
Home	Each Occurrence	\$
Watercraft	Each Occurrence	\$

Household Net Worth

Net Worth	Protected	\$
	At-Risk	\$
	Total	\$

Recommended Next Steps

866.834.1040 | WWW.LEVELFOURFINANCIAL.COM

Securities offered through Level Four Financial, LLC Member FINRA/SIPC. Advisory services offered through Level Four Advisory Services, LLC, an SEC-registered investment adviser. Insurance services offered through Level Four Insurance Agency, LLC. Level Four Financial, LLC, Level Four Advisory Services, LLC, and Level Four Insurance Agency, LLC are independent entities. Level Four Group, LLC is a division of CRI Capital Group, LLC, a subsidiary of CRI Advisors, LLC. "CRI" is the brand name under which Carr, Riggs & Ingram, L.L.C. ("CPA Firm") and CRI Advisors, LLC ("Advisors") and its subsidiary entities provide professional services. CPA Firm and Advisors (and its subsidiary entities) practice as an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations and professional standards. CPA Firm is a licensed independent CPA firm that provides attest services to its clients, and Advisors and its subsidiary entities provide tax and business consulting services to their clients. Advisors and its subsidiary entities are not licensed CPA firms.