

MONEY SHIELD®

Use this worksheet to take inventory of your insurance policies.

Vehicle insurance			
Vehicle 1		Premium expense	
Deductible		Comprehensive coverage	
Vehicle 2		Premium expense	
Deductible		Comprehensive coverage	

Home / Renters insurance			
Type of coverage		Premium expense	
Deductible		Comprehensive coverage	

Medical insurance			
Type of coverage		Maximum Out-of-Pocket	
Premium expense		Deductible	

Life insurance			
Policy holder 1		Premium expense	
Beneficiary		Death Benefit	
Company name		Policy type	
Contact number		Cash value	
Policy holder 2		Premium expense	
Beneficiary		Death Benefit	
Company name		Policy type	
Contact number		Cash value	

Long-Term Care insurance			
Policy holder 1		Premium expense	
Daily benefit x # days		Maximum benefit	
Policy holder 1		Premium expense	
Daily benefit x # days		Maximum benefit	