

Getting Started

A change in your life could mean it's time to reevaluate your life insurance coverage. The following checklist includes examples of life changes that can affect the type and amount of life insurance you need. Whether you've experienced a significant life event, or it's been more than a year since your last policy review, now is a good time to schedule a comprehensive Life Check-Up with your financial professional to make sure your coverage still meets your needs.

Complete this quick checklist and work with your agent to identify next steps based on your results.

Since the last meeting with your financial professional, have you:

- | | |
|---|--|
| <input type="checkbox"/> Become married or divorced | <input type="checkbox"/> Considered retirement |
| <input type="checkbox"/> Changed jobs or lost your job | <input type="checkbox"/> Been in an accident or become disabled |
| <input type="checkbox"/> Purchased a home | <input type="checkbox"/> Lost a loved one |
| <input type="checkbox"/> Welcomed a new member to the family | <input type="checkbox"/> Received an inheritance or an unexpected windfall |
| <input type="checkbox"/> Started a new business | <input type="checkbox"/> Become a grandparent |
| <input type="checkbox"/> Begun caring for an elderly family member or a person with special needs | <input type="checkbox"/> Become an empty nester |
| <input type="checkbox"/> Started saving for education | |

Check any of the statements below that describe your situation:

- | | |
|--|---|
| <input type="checkbox"/> I want to increase/decrease my insurance or premium amount | <input type="checkbox"/> I want to know about transferring assets |
| <input type="checkbox"/> I want to review and/or change my beneficiaries | <input type="checkbox"/> I need help with my investments |
| <input type="checkbox"/> I'm looking for ideas for an additional investment | <input type="checkbox"/> It's time to start an education savings plan |
| <input type="checkbox"/> I'm interested in making or changing my retirement plan contributions | <input type="checkbox"/> I'd like to review/create an estate plan |
| | <input type="checkbox"/> I want to set up a trust |

Additional information on next page.



What are you interested in learning more about?

- Life insurance
- Investing
- Retirement planning
- College funding
- Long-term care insurance
- Trusts
- Disability income insurance
- Estate planning
- Business continuation or business planning

Other _____

Contact me for more information or to schedule your Life Check-Up.

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