



FAMILY PROTECTION CHECKLIST

LIFE INSURANCE PLANNING

- ☐ Do you currently have life insurance? If yes, is it enough?
- ☐ Have you reviewed your policy recently?
- ☐ Would your family be financially secure if something happened to you?

RETIREMENT & FUTURE PLANNING

- ☐ Have you started saving for retirement?
- ☐ Do you understand the benefits of permanent life insurance or an IUL?
- ☐ Would you like to learn about tax advantaged retirement options?

ESTATE PLANNING & LONG TERM CARE

- ☐ Do you have a will or trust in place?
- ☐ Have you considered long-term care insurance or coverage for medical events?
- ☐ Are your documents organized and accessible to your family?

ESTATE PLANNING & LONG TERM CARE

- ☐ Do your children have any coverage in place?
- ☐ Would you like to start a college savings or protection plan for them?
- ☐ Have you named legal guardians and made arrangements in case of emergency?

NEXT STEPS

- ☐ Review your answers and identify areas where you need information.
- ☐ Contact us for a personal consultation- we're here to help you plan with confidence.