



FAMILY PROTECTION PLANNER™

A Simple Guide to Protecting Your Home, Income, and Family

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Protecting Families, Homes, and Futures.

Life is unpredictable, but your family's future doesn't have to be.

This planner is designed to help you organize important information, identify potential gaps in your financial protection plan, and take simple steps toward greater peace of mind.

Use this checklist to quickly assess where your family stands today.

Income Protection

- I currently have life insurance.
 - My life insurance would provide meaningful financial support for my family.
 - I know who my beneficiaries are.
 - My beneficiaries are up to date.
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Home Protection

- I know my current mortgage balance.
 - My family could afford to remain in our home if my income disappeared.
 - We have an emergency fund.
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Estate Planning

- I have a will or estate plan.
- My spouse or trusted family member knows where important documents are located.
- My family has discussed our wishes and plans.

Family Information

Primary Contact:

Name: _____

Phone: _____

Email: _____

Spouse/Partner:

Name: _____

Phone: _____

Email: _____

Children or Dependents:

Emergency Contact:

Phone: _____

MORTGAGE AND FINANCES

Home Information

Mortgage Company:

Current Mortgage Balance:

\$ _____

Monthly Mortgage Payment:

\$ _____

Years Remaining:

Savings & Emergency Fund

Current Savings:

\$ _____

Emergency Fund:

\$ _____

Emergency Fund Goal:

\$ _____

LIFE INSURANCE

Policy #1 _____ (insured)

Insurance Company:

Coverage Amount:

\$ _____

Beneficiary:

Policy Location:

Policy #2 _____ (insured)

Insurance Company:

Coverage Amount:

\$ _____

Beneficiary:

Policy Location:

Policy #3 _____ (insured)

Insurance Company:

Coverage Amount:

\$ _____

Beneficiary:

Policy Location:

Policy #4 _____ (insured)

Insurance Company:

Coverage Amount:

\$ _____

Beneficiary:

Policy Location:

IMPORTANT DOCUMENTS & CONTACTS

Contacts

Primary Physician:

Pediatrician:

Attorney:

Accountant:

Financial Professional:

Insurance Professional:

Other:

Important Documents and Location

- Will
- Trust
- Insurance Policies
- Mortgage Documents
- Birth Certificates
- Social Security Cards
- Password Storage Information

Location(s):

FAMILY EMERGENCY PLANNING

If something happened to me tomorrow...

Who would manage the finances?

Who would care for the children?

Who would have access to important accounts?

Who would know where important documents are stored?

What financial concerns do I still have?

NEXT STEPS

Protecting your family doesn't require having all the answers today.

It starts with understanding where you are, identifying potential gaps, and creating a plan.

Review this planner annually and update it whenever there is a major life event such as:

- Marriage
- Birth of a child
- Home purchase
- Job change
- Significant income change
- Retirement planning

Need Help Reviewing Your Plan?

Moreno Insured offers complimentary Family Protection Reviews to help families better understand their options and identify potential gaps. Call, text, email, or schedule your free consult on our website at any time.

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Protect What Matters Most.