

SHIRLEY FLUKER TRAHAN

HEARING BUSINESS CONCEPTS

**HELPING
THE DEAF and HARD OF
HEARING
BECOME FINANCIALLY
STABLE BY SECURING A
BETTER
FINANCIAL FUTURE**

Shirley Fluker Trahan

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www.hearingbusinesses.com · Insurance Agent



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- () I have life insurance
- () I have life insurance outside of my job
- () I have a final expense policy
- () My spouse/children have life insurance
- () I have enough coverage
- () I have a beneficiary listed
- () I complete an annual review of my coverage
- () I have a licensed Insurance Agent

My Financial Checklist

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My Life Insurance Policy



My Life Insurance Company



My Family Coverage



My Life Insurance Benefits



My Annual Review



My Life Insurance Agent



Financial Supplies Checklist

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- Copy of my Life Insurance Policy

- Electronic copy of Life Insurance

- Insurance Company contact information

- ER contact list filed

- ER contact family list

- Last will Testament

- DNR (Do not resuscitate) on file

- Estate Planning

- Annual Review Date

- My Agent Contact Information
