

Time For A Life Check-up



Life can change in an instant, so it's important to keep reviewing your plans and priorities. Make sure your family has the financial protection they need *right now*.



WHEN DID YOU LAST LOOK AT YOUR COVERAGE?

If you've already got insurance, great, but how long ago were your policies purchased? A change in your life could mean it's time to update your life insurance. You may need more coverage, less coverage, or even a different type of insurance.

SCHEDULE A COMPREHENSIVE LIFE CHECK-UP

The checklist below includes examples of life changes that can affect the type and amount of life insurance you need. Even if you haven't experienced any major changes in your life, it's a good idea to schedule regular policy reviews to make sure your coverage still meets your needs.

GET STARTED

Please fill out this quick checklist. A licensed agent can help you identify next steps based on your results.

Since last meeting with a financial professional, have you...

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

Check any of these situations that apply to you:

- I want to increase/decrease my insurance coverage
- I want to review and/or change my beneficiaries
- I'm looking for ideas for an additional investment
- I'd like to change my retirement plan contributions
- I want to know about transferring assets
- I need help with my investments
- It's time to start an education savings plan
- I'd like to review/create an estate plan
- I want to set up a trust

What are you interested in learning more about?

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

Let's talk. Give me a call today.