North American Company
for Life and Health Insurance
Since 1886

Life

Client review

Client profile

Name: ______________________________ **Agent code:** ____________________

Email: ______________________________ **MGA:** ____________________

Not only does life change, but life insurance products change over time. That's why it's important for you to have a regular client review practice in place. Trust, credibility, and long-term relationships are just the beginning to the benefits of scheduling reviews.

Help your clients keep their life insurance protection current

If your clients have any of these life changing events…

- New child or grandchild
- New job
- Inheritance
- Major investment gain/loss
- Health concerns
- Change in marital status
- Change in estate plan
- Sales or purchase of a home
- Start/purchase a business
- Sold or acquired assets
- Death of family member
- New investments
- Retirement
- Gain/loss of business partner

… It may be time to schedule a North American client review.

List the names of five clients who fit the above profile and whom you would like to help meet their life insurance needs and financial goals.

Client name: ______________________ **Age:** ______ **Gender:** ______ **Tobacco:Y/N** ______ **State:** ____
Premium amount: ______________________ **Retirement age:** ______

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