

# LIFE INSURANCE ANNUAL REVIEW CHECKLIST

When life changes, so should your life insurance. This Annual Review Checklist provides common examples of life changes that may impact your coverage. If you have experienced one or more of the below changes, we recommend contacting a licensed insurance professional for an annual review.

Even if you haven't experienced a significant life change, it is still a good idea to review your current coverage to make sure your plan still meets your needs.

## Which of the following apply to you?

- |  |  |
|--|--|
| <input type="checkbox"/> Married or divorced                           | <input type="checkbox"/> Received an inheritance                               |
| <input type="checkbox"/> Changed, left, or lost job                    | <input type="checkbox"/> Became a grandparent                                  |
| <input type="checkbox"/> Purchased or sold real estate                 | <input type="checkbox"/> Interest in transferring assets to heirs or charities |
| <input type="checkbox"/> Welcomed a new member to the family           | <input type="checkbox"/> Updated Estate Planning documents                     |
| <input type="checkbox"/> Started a new business                        | <input type="checkbox"/> Desire/Need to update beneficiaries                   |
| <input type="checkbox"/> Began caregiving for an elderly family member | <input type="checkbox"/> Desire to create/review an Estate Plan                |
| <input type="checkbox"/> Lost a loved one                              | <input type="checkbox"/> Desire to create a Trust                              |

## Would you like additional information on any of the following topics?

- |   |  |
|---|--|
| <input type="checkbox"/> Life insurance           | <input type="checkbox"/> Trust                       |
| <input type="checkbox"/> Investing                | <input type="checkbox"/> Disability income insurance |
| <input type="checkbox"/> Retirement planning      | <input type="checkbox"/> Estate planning             |
| <input type="checkbox"/> Long-term care insurance | <input type="checkbox"/> Something else:             |

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