

INSURANCE POLICY REVIEW

Life changes quickly; that's why it's important to periodically evaluate your financial and life insurance needs.

When was the last time you looked at your life insurance policies? How long ago were they purchased? Have there been any changes in your life or financial plans that might affect the amount of insurance coverage you desire?

An insurance review can help you make sure your policies fit your current goals and financial plans. Your family's financial future is too important to leave to chance.

Is it time for an insurance review? Here's a list of things to look for:



Changes in Beneficiaries

- ☐ Recent marriage or divorce?
- ☐ New child or dependent?
- ☐ Children grown and out of the house?
- ☐ Death of spouse or dependent?



New Debt

- ☐ Purchased a home?
- ☐ Started or own a business?
- ☐ Need to fund a higher education?



Changes in Your Financial Responsibilities

- ☐ Change in employment status or salary?
- ☐ Need to plan for retirement?
- ☐ Need to support anyone with special needs or an elderly family member?
- ☐ Received an inheritance?

If you answered "yes" to any of these questions, contact your financial professional about an insurance review today.

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