ADVISORS ACCELERATED LLC.

Life Insurance: Annual Review Checklist

Life changes, so should your life insurance. You can use this Annual Review Checklist to determine if you may need more coverage, less coverage or a different type of insurance. The checklist provides common examples of life changes that may have an impact on your coverage. If you have experienced one or more of the below life changes call and schedule an annual review. Even if you haven't experienced a significant life change, it is still a good idea to review your current coverage and make sure it still meets your needs.

Since the last meeting with your financial professional, have you...

- married or divorced
- changed jobs or lost your job
- purchased a home
- welcomed a new member to the family
- started a new business
- began caregiving 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
- become a grandparent
- become an empty nester

Do any of the below statements describe your situation?

- I want to increase/decrease my insurance premium amount
- I want to review and/or change my beneficiaries
- I am looking for ideas for an additional investment
- I am interested in making or changing 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
- Investing
- Retirement planning
- Long-term care insurance
- Trusts
- Disability income insurance
- Estate planning

Get in touch with your agent and set up an appointment: 614-785-5100