

## Life Check-Up

## **Getting started**

A change in your life could mean it's time to reevaluate your life insurance coverage. The following checklist includes examples of life changes that can affect the type and amount of life insurance you need. Whether you've experienced a significant life event, or it's been more than a year since your last policy review, now is a good time to schedule a comprehensive Life Check-Up with your financial professional to make sure your coverage still meets your needs.

Complete this quick checklist and work with your financial professional to identify next steps based on your results.

## Since the last meeting with your financial professional, have you:

	Become married or divorced		Considered retirement		
	Changed jobs or lost your job		Been in an accident or become disabled		
	Purchased a home		Lost a loved one		
	Welcomed a new member to the family		Received an inheritance or an unexpected windfall		
	Started a new business		Become a grandparent		
	Begun caring for an elderly family member or a person with special needs		Become an empty nester		
	Started saving for education				
Check any of the statements below that describe your situation:					
	l want to increase/decrease my insurance		l want to know about transferring assets		
	or premium amount		l need help with my investments		
	l want to review and/or change my beneficiaries		It's time to start an education savings plan		
	I'm looking for ideas for an additional investment		l'd like to review/create an estate plan		
	I'm interested in making or changing my retirement				

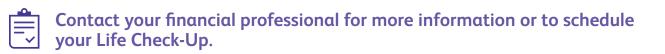
I want to set up a trust

## Additional information on next page.

plan contributions



What are you interested in learning about?					
Life insurance	Trusts				
Investing	Disability income insurance				
Retirement planning	Estate planning				
College funding	Business continuation or business planning				
Long-term care insurance					
Other:					



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