Annual Review Checklist

This checklist is to help you think about the changes in your life in relationship to products and services that are available to help you achieve your financial goals.

Over the last year, I have:

- Changed my job
- Changed my residence
- Purchased or expanded my business
- Created a buy-sell plan
- Changed marital status
- Added to my family (including grandchildren)
- Changed my will
- Changed beneficiaries on my policies
- Received an inheritance
- Bought or sold property

For my family/me, I am interested in:

- Life insurance
  - Whole life
  - Variable life
  - Term
- Disability insurance
- Long term care insurance
- Retirement planning
  - IRA – tax advantage savings
  - Charitable Remainder Trust
  - Wealth pay-out strategies
  - Wealth transfer strategies
- Health insurance

For my business, I am interested in:

- Disability income insurance
- Deferred compensation
- Business overhead insurance
- Business Buy-Sell Funding
- Key Person strategies
- Pension plans and strategies
- Employee Benefit Programs and Strategies
- Business Liability Insurance