



Pacific Benefit Planners Employee Benefits Specialists

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P&C Review Checklist

Name:

Date:

Current Policy(ies): _____

This checklist is to help you think about the changes in your life in relationship to insurance products and services that are available to help you identify and mitigate risk.

Since I spoke with you last, 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

Bought or sold property/vehicles

For my family/me, I am interested in:

Life insurance

Disability insurance

Long term care insurance

Retirement planning

Health insurance

Home

Vehicle

Umbrella

Other:

For my business, I am interested in:

Risk Management

Workers Comp

Commercial General Liability

Professional Liability

Commercial Property

Commercial Auto

Employee Benefits (adding or improving non-medical benefits)

Other: