AMW GROUP

Time for a Life Check-Up

Annual Protection Review

Life can change in an instant, so it is important to keep reviewing your plans and priorities. Make sure your family and your business have the protection they need right now.

When did you last look at your coverage? A change in your life could mean it is time to update your insurance. You may need more coverage, less coverage, or a different type of protection.

How to use this checklist: Check the items that apply and bring it to your review. Even without major changes, regular policy reviews help make sure your coverage still meets your needs.

Name: _____ **Date:** _____ **Phone or Email:** _____

SINCE YOUR LAST REVIEW, HAVE YOU...

- ☐ Become married or divorced
- ☐ Changed jobs or lost your job
- ☐ Purchased a home
- ☐ Welcomed a new member to the family
- ☐ Started or grew a business
- ☐ Signed, renewed, or considered a commercial lease or building purchase
- ☐ Begun caring 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 or unexpected windfall
- ☐ Become a grandparent
- ☐ Become an empty nester

SITUATIONS THAT APPLY TO YOU

- ☐ I want to increase or decrease my insurance coverage
- ☐ I want to review or change my beneficiaries
- ☐ I want to review my business insurance
- ☐ I'm considering leasing or buying commercial property
- ☐ I want to protect my income if I cannot work
- ☐ I want to plan for long-term care costs

I'D LIKE TO LEARN MORE ABOUT

- ☐ Life insurance
- ☐ Long-term care insurance
- ☐ Disability income insurance
- ☐ Commercial insurance
- ☐ Commercial real estate

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