



Life Events Checklist

Have Your Needs Changed?

A periodic review and analysis of your life insurance needs is an important part of your financial protection. Have your needs changed since purchasing the policy? Is the policy still performing according to expectations—and meeting financial goals? To determine how to help meet your financial goals, please complete the form below.

COMMON LIFE EVENTS

- | | | |
|---|---|--|
| <input type="checkbox"/> New child or grandchild | <input type="checkbox"/> New investments | <input type="checkbox"/> Gain/loss of business partner |
| <input type="checkbox"/> Change in marital status | <input type="checkbox"/> Inheritance sale or purchase of home | <input type="checkbox"/> Health concerns |
| <input type="checkbox"/> Death of family member | <input type="checkbox"/> Retirement | <input type="checkbox"/> Sold or acquired assets |
| <input type="checkbox"/> New job or promotion | <input type="checkbox"/> Major investment gain/loss | |
| <input type="checkbox"/> Change in estate plan | <input type="checkbox"/> Start/purchase a business | |

AREAS OF INTEREST OR CONCERN

- | | | |
|--|---|--|
| <input type="checkbox"/> Retirement planning | <input type="checkbox"/> Estate planning | <input type="checkbox"/> Business/executive benefits |
| <input type="checkbox"/> College funding | <input type="checkbox"/> Planning for parents | <input type="checkbox"/> Business continuation |
| <input type="checkbox"/> Survivor benefit planning | <input type="checkbox"/> Charitable giving | <input type="checkbox"/> Other: _____ |

ADDITIONAL COMMENTS AND NOTES:

CONTACT INFORMATION:

Name: _____

Address: _____

Phone: _____ Best time to call: _____

Email: _____

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IRS CIRCULAR 230 NOTICE

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