

# Is it time for a life insurance review?

As your life changes, it's important to check that your life insurance policy continues to cover your needs. An insurance review is a great opportunity to evaluate your current policy and make adjustments as needed.

## Get Started

### When did you last look at your coverage?

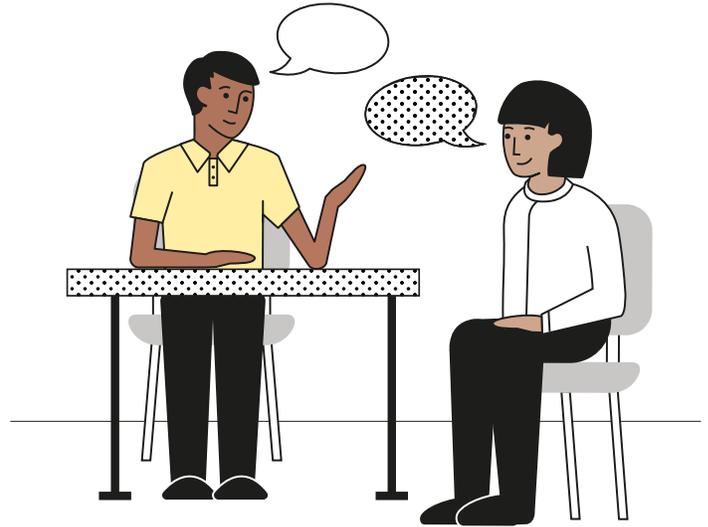
Insurance educators suggest that policy owners should evaluate their coverage annually or anytime a major life event happens. You may need more coverage, less coverage, or even a different type of insurance.

### Fill out the checklist

The checklist on this page includes examples of life changes that can affect the type and amount of life insurance you need.

### Schedule a comprehensive life check-up

Even if you haven't experienced any major changes in your life, it's a good idea to schedule regular policy reviews to make sure your coverage still meets your needs. A licensed agent can help you identify next steps based on your results.



### Check any of the situations that apply to you:

- Got married or divorced
- Changed jobs or lost your job
- Purchased a home
- Welcomed a new member to the family
- Started a new business
- Began caring for an elderly family member, an adult child or a person with special needs
- Started saving for education
- Have left or re-entered the workforce
- Retired or considered retirement
- Been in an accident or became disabled
- Became widowed
- Received an inheritance or unexpected windfall
- Became a grandparent
- Became an empty nester

### Check any of the following that apply to you:

- I want to increase/decrease my insurance coverage
- I want to review and/or change my beneficiaries
- I'd like to change my retirement plan contributions
- I want to know about transferring assets
- It's time to start an education savings plan
- I'd like to review/create an estate plan
- I want to set up a trust

### Would you like to learn more about your life insurance options?

- Yes
- No