Insurance Policy Review Meeting Agenda

Review existing insurance policy statements to ensure records are up to date:

☐ Coverage ☐ Beneficiary ☐ Premium ☐ Address

Discuss current amount and type of coverage owned:

☐ Do you understand the coverage you own? ☐ Does the coverage still meet your needs?

Discuss life changes that may have occurred since our last meeting:

☐ Marital status ☐ Family addition ☐ Health change ☐ Smoking status
☐ Employment status ☐ New home ☐ Mortgage renewal ☐ Group changes

Agree on any actions that are required including responsibility and timeframe for completion?

Know Your Client Review

Fully understanding your financial situation is the only way I can be sure that the recommendations I make and the advice I give you is appropriate. I have recently implemented a new "Know Your Client" process that I am introducing to all my clients. This process will only take a few minutes to complete and will provide you with an analysis that will help to clarify our relationship and the type of services you may require from me in the future.

☐ Short questionnaire to gather high-level financial information, goals and objectives.
☐ Review the "Big Picture" and discuss results as it pertains to your financial independence.
☐ Complete the "Financial Review Checklist" to identify possible areas of concern.
☐ Discuss next steps, responsibilities and timeframe: