

Life Check-up: Getting Started

Life changes, so should your life insurance.



A change in your life could mean it's time to change your life insurance. You may need more coverage, less coverage, or even a different type of insurance. The checklist below includes examples of life changes that can affect the type and amount of life insurance you need. If you've experienced one of these, or another significant life event, now is a good time to 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.

Get started by filling out this quick checklist. Your agent can help you identify next steps based on your results.

Since your last meeting with your financial professional have you...

- Become married or divorced
- Changed jobs or lost your job
- Purchased a home
- Welcomed a new member to the family
- Started a new business
- 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 an unexpected windfall
- Become a grandparent
- Become an empty nester

Check any of the statements below that describe your situation:

- I want to increase/decrease my insurance or premium amount
- I want to review and/or change my beneficiaries
- I'm looking for ideas for an additional investment
- I'm interested in making or changing my retirement plan contributions
- I want to know about transferring assets
- I need help with my investments
- 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

What are you interested in learning more about?

- Life insurance
- Investing
- Retirement planning
- Other _____
- College funding
- Long term care insurance
- Trusts
- Disability income insurance
- Estate planning
- Business continuation or business planning

Find out more about Protective's Life Check-up by contacting your agent:

<<agent name>>

<<agent phone>> | <<agent email>>