



# Life Insurance Inventory

Fact Finder

Client name \_\_\_\_\_

(Some information may be obtained by reviewing the policies and in force illustrations that the client has brought to the meeting.)

Have you reviewed your life insurance within the past two years?  Yes  No

	Policy 1	Policy 2	Policy 3
Policy number	_____	_____	_____
Face amount of policy	_____	_____	_____
Type of policy	_____	_____	_____
Insured	_____	_____	_____
Policy owner	_____	_____	_____
Beneficiaries	_____	_____	_____
Are beneficiaries current?	_____	_____	_____
Premium amount	_____	_____	_____
Policy loan? Amount?	_____	_____	_____
Rider information	_____	_____	_____
<b>Total death benefit amounts on client</b>	_____	_____	_____
<b>Total death benefit amounts on spouse</b>	_____	_____	_____

In addition to providing you with protection, your insurance policy may also be customized to reflect your unique and specific concerns. Special “add-ons”, or riders, may be added to address your future needs. Possibilities include:

- Should you become disabled, premiums will be waived throughout your disability, freeing up cash to meet other financial obligations (e.g. mortgage payments, living expenses, etc).
- In the event of a Terminal, Chronic or Critical illness, the death benefit can be accelerated.
- You can defer the purchase of coverage while locking in its availability regardless of your future health.