



Did you know that your existing clients offer an abundant source of untapped life insurance opportunities?

In fact, a policy review – or Life Check-Up – may be appropriate for those who have experienced any of the following lifestyle changes:

- Marriage or divorce
 - Purchasing a new home
 - Childbirth or adoption
 - A new job or career change
- Significant changes in their income
 - Starting or owning a business
 - Financial support of an elderly parent(s)
 - Nearing retirement

Use this worksheet to identify potential Life Check-Up prospects from your current book of business.

IDENTIFIED PROSPECTS				
Client Name	Married or Single	Number of Children	Current Coverage Amount	Life Insurance Objectives

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