When life changes, your playbook may have to change as well. What you do next can make all the difference.

[Producer Return Address]

Often, life changes bring uncertainty and stress. Things may need to be re-organized. That includes your financial life. To determine if it is time to review your financial goals, use this checklist. Then give us a call! Have you recently experienced any of the following?

_____New child or grandchild
_____Marital status
_____Death in the family
_____New job or promotion
_____New investments
_____Inheritance sale or purchase of a home
_____Retirement
_____Major investment gains/loss
_____Gain/loss of business partner
_____Health concerns

Please call us if you have experienced any of the above for a complimentary insurance review: [Agent Name], at [Agent Phone].

1117-02

{Client Name}
{Client Address}

By responding to this postcard, you may be contacted by an Insurance Agent.
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