

[AGENT LOGO or BUSINESS NAME]



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

Life is unpredictable, and the passage of time may bring about a new home, job change, children, and even a change in health. These are all life events that may affect your financial future. 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 directly or fill out and return this letter if you have experienced any of the above for an insurance review. We will help you determine if it's time to update your goals and plans.

Name _____

Best number to reach me: _____ Best Time to Call _____

I'd rather you emailed me at: _____

[Agent Name], at [Agent Phone]
[Agent Email or Website]
[Agent Address]