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Annual Review Letter

Date

Client Name
Address
City, ST ZIPCODE
Dear Client/Prospect,

Periodically it is a good idea to review your situation to make sure that everything is up-to-date and that you have the best possible investment strategies, solutions and coverages in place to meet your current needs. Now is a good time to review your program and to request any services or information. Please take a few moments to review the material below and the Life Transition Checklist on the next page. Please return this letter to me in the postage-paid envelope with your requests so that I can be better prepared to serve you when we get together.

I would like information on the following:

- ❒ Extending/decreasing my current length of coverage
- ❒ Increasing/decreasing my current amount of coverage
- ❒ Selling my current policy for a profit
- ❒ Annuities
- ❒ Retirement Planning
- ❒ Tax Protection, Equity Repositioning
- ❒ Mortgage Insurance
- ❒ Spouse or Child Life Insurance
- ❒ Other

Please Note:

- ❒ I would like to review my options on my present insurance policy
- ❒ I would like you to review the insurance policy of a family member or friend
- ❒ My beneficiary has changed
- ❒ My marital Status has changed
- ❒ My name has changed
- ❒ My address has changed
- ❒ My telephone number has changed
- ❒ I would like you to contact ____________________ who needs you advice and services

I look forward to our next visit and following through on my promise to provide you with the best possible service, products and advice to help your reach your goals and prosper.

Best Regards,

Advisor

Life Transitions Checklist

What happens in your life has an impact on your finances.

By knowing the timing of events in your life we can help you with the financial side of the transition. It is possible that one of the following transitions will take place for you, or someone you know during the next 12 months? Review the list below and identify items by date that will need more discussion during our planning meeting.

Timelines	Event	Timelines	Event
	Marriage		Spouse begins or stops work
	Birth of a Child or Grandchild		Relocation for a New Job
	Divorce		Start-Up New Business
	Death of a Spouse		Losing Job or Failure of Business
	Remarriage		Leaving Employment at Retirement
	Children go to College		Selling Business
	Last Child Leaves Home		Selling Home
	Child Marries		Relocation for Retirement
	Adult Child Divorces or Child's Spouse Dies		Disability or Chronic Illness of Self or Spouse
	Remarriage of Adult Children		Disability or Chronic Illness of Parent/Grandparent
	Purchase of Home		Disability or Chronic Illness of Adult Child
	Leaving a Legacy		Death of Parent/Grandparent
	Receiving an Inheritance		Relocation to Assisted Care Facility
	New Employer/New Career		Parent Relocated to Assisted Care Facility