

# Addie Woods Consulting Co.

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## POLICY Review Letter

Date

Client Name

Address

City, ST ZIPCODE

Dear Client/Prospect,

Periodically it is a good idea to review your existing insurance policies to make sure that they are up-to-date and that you have the best possible coverage for your current needs. Now is a good time to review your policies and to request any services or information. Please review the Life Transition Checklist on the following page and return this letter 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:

- |  |   |
|--|---|
| <input type="checkbox"/> Extending/decreasing my current length of coverage  | <input type="checkbox"/> Retirement Planning                  |
| <input type="checkbox"/> Increasing/decreasing my current amount of coverage | <input type="checkbox"/> Tax Protection, Equity Repositioning |
| <input type="checkbox"/> Selling my current policy for a profit              | <input type="checkbox"/> Mortgage Insurance                   |
| <input type="checkbox"/> Annuities   | <input type="checkbox"/> Spouse or Child Life Insurance       |
|  | <input type="checkbox"/> Other                                |

Please Note:

- |   |  |
|---|--|
| <input type="checkbox"/> I would like to review my options on my present insurance policy             | <input type="checkbox"/> My name has changed   |
| <input type="checkbox"/> I would like you to review the insurance policy of a family member or friend | <input type="checkbox"/> My address has changed  |
| <input type="checkbox"/> My beneficiary has changed   | <input type="checkbox"/> My telephone number has changed                                     |
| <input type="checkbox"/> My marital Status has changed  | <input type="checkbox"/> I would like you to contact _____ who needs you advice and services |

Please return this checklist in the postage paid envelope. I look forward to assisting you with your life insurance and retirement needs as your personal and financial situation changes.

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          |
|           |   |           |   |