

Is life insurance part of your financial plan?



Term life insurance

Term Life insurance is more than a 'nice-to-have.' It's part of sound financial planning — a smart money move, just like saving for retirement. Adding term life insurance to your long-term plan can help set your family up for financial resiliency. Designed to help with the "what happens if" scenario.

Permanent life insurance

Permanent Life insurance is designed for the client looking to get more out of their life insurance plan. There are level Guaranteed products for the planner, the person looking to make sure they are protecting the ones they care about "when I die old", but there are also cash value products which can be used as a retirement strategy.

Life can change in an instant, so it's important to review your protections to make sure your family has the financial protection they need RIGHT NOW.

If you have experienced any of the following life changing events, it may affect the amount of life insurance you need. Complete the below and schedule a time to talk with us!

- Became married or divorced
- Changed jobs or lost your job
- Purchased a home
- Welcomed a new member to the family
- Started a new business
- Began caring for an elderly family member, an adult child or a person with special needs
- Started saving for education
- Have left or re-entered the workforce
- Considered retirement or became retired
- Been in an accident or became disabled
- Became widowed
- Received an inheritance or unexpected windfall
- Became a grandparent
- Became an empty nester

Check any of these situations that apply to you:

- I want to increase/decrease my insurance coverage
- I want to review and/or change my beneficiaries
- I'm looking for ideas for an additional investment
- I'd like to change my retirement plan contributions
- I want to know about transferring assets
- I need help with my investments
- It's time to start an education savings plan
- I'd like to review/create an estate plan
- I want to set up a trust

**Please Contact us with
any Life Insurance
Questions**



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