

Your Custom Title

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Mark Reynolds
Title

✓ INSURANCE SURVEY

Give Your Insurance Coverage a Quick Checkup

Take a Moment to Ensure You Still Have the Appropriate Policies

Managing risk should be the cornerstone of a sound financial strategy. But insurance can often be overlooked in favor of more pressing financial issues, such as investing and saving for retirement. By filling out this survey and returning it in the enclosed envelope, you will help us determine whether your coverage is still offering your family the appropriate level of protection.

Which two of these types of insurance coverage concern you the most?

- Life insurance
- Disability income insurance
- Liability insurance
- Medical insurance
- Medical insurance in retirement
- Property and casualty insurance
- Long-term-care insurance

Circle the types of coverage that you currently own.

Have there been any major changes in your life? (Check all that apply)

- There is a new child/grandchild in our family.
- My marital status has changed.

- My income has changed significantly.
- My net worth is much different than it was when I originally purchased life insurance.
- I purchased or sold a primary residence.
- I paid off my home mortgage.
- Other _____

Apart from the face value, the most important aspect of your life insurance policy may be the beneficiary designations. Can you still name your primary and secondary beneficiaries?

Primary #1 _____
Primary #2 _____
Primary #3 _____
Secondary #1 _____

(continued on back)

Secondary #2 _____
Secondary #3 _____

I'm not sure who my beneficiaries are.

Are all your beneficiaries still alive and in good health?

Yes No Not sure

Are you concerned that the face value of your life insurance policy may no longer be adequate for your family's needs?

Yes No Not sure

How concerned are you that inflation has eroded the value of your death benefit, so that your beneficiaries may not enjoy the same level of protection as when you initially bought your policy?

- Very concerned
- Concerned
- Not concerned
- I'd like more information on how inflation affects my life insurance.

At what age do you plan to retire?

- Age _____
- Not sure
- I have been retired since age _____

Would you like more information on the role that life insurance could play in your retirement?

Yes No

Do you expect your estate to be subject to federal and/or state estate taxes?

Yes No Not sure

Do you have other questions or concerns related to insurance? _____

The cost and availability of life insurance depend on factors such as age, health, and the type and amount of insurance purchased. Before implementing a strategy involving life insurance, it would be prudent to make sure that you are insurable. As with most financial decisions, there are expenses associated with the purchase of life insurance. Policies commonly have mortality and expense charges. In addition, if a policy is surrendered prematurely, there may be surrender charges and income tax implications.

Your name _____

Phone number _____

Email _____

Thank you for taking the time to complete this survey.

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