



Any client can — and should — benefit from a policy review every three to five years, as well as following any major lifestyle changes.



- Click on the links for easy access to materials
- No login or password is required
- Internet access is required to open links

POLICY REVIEW

AGENT & ADVISOR MATERIALS

- ▶ The Ideal Client
- ▶ Presentation

CLIENT MATERIALS

- ▶ How a Policy Review Works
- ▶ Case Study and Worksheet
- ▶ FAQs
- ▶ Check-in Letter
- ▶ Customizable Check-in Flyer
- ▶ Customizable What If... Sales Concept

HELPFUL CALCULATORS

- ▶ Simple Life Insurance
- ▶ Comprehensive Life Insurance
- ▶ Life Expectancy
- ▶ The Value of Your Income Contribution
- ▶ Net Worth
- ▶ Home Budget Analysis
- ▶ Student Budget
- ▶ College Savings
- ▶ Social Security Retirement Benefits Estimate