



# Level4Life Insurance Inventory

**Client** \_\_\_\_\_

(some Information may be obtained by reviewing the policies that the client has brought to the meeting)

Have you reviewed your life insurance within the past two years?    Yes     No

	<b>Policy 1</b>	<b>Policy 2</b>	<b>Policy 3</b>
Insured	_____	_____	_____
Policy Owner	_____	_____	_____
Beneficiaries	_____	_____	_____
Policy Number	_____	_____	_____
Face Amount	_____	_____	_____
Current Cash Surrender Value	_____	_____	_____
Current Cash Value	_____	_____	_____
Are beneficiaries current?	_____	_____	_____
Premium Amount	_____	_____	_____
Policy loan? Amount?	_____	_____	_____
Rider Information	_____	_____	_____
Purpose for Coverage	_____	_____	_____
<small>(Survivor(s), Business, Retirement, Estate Planning, Other)</small>			

Is this reason still a high priority to you? \_\_\_\_\_

Do you have any concerns about this policy?

If 'Yes', what are they?     Length of Protection     Cost     Flexibility     Customer Service

In addition to reviewing your life insurance, providing a complete analysis of your current needs and objectives is imperative for indentifying proper amounts and types of coverage. Complete the ***Personal Information and Roadmap Booklet*** to assist in navigating the freeway to your future.