

# INSURANCE REVIEW AGENDA

- **Verify and Update Contact Information**
- **Discuss current Needs and Risks that you have at this time in your Life**
- **Review Coverages on the Policies you have:**
  - **Life**
    - Needs Analysis
    - Coverage at work?
  - **Home**
    - Coverage's vs. Value
    - Remodeling, Changes, New roof, etc...
    - Billing - Mortgage Address & Loan #
    - Mortgage Protection
    - Sewer Back Up, Earthquake, Flood
    - Jewelry, Identity Theft, Firearms, Fine Arts
    - Discounts – Saving Options
  - **Auto**
    - Vehicles & Drivers
    - Coverages & Lien holders
    - Billing – AFT, Online (Paperless), Mobile App
    - Discounts – Saving Options
    - ATV, Boats, Motor Homes Etc...
  - **Health**
    - Do you have health insurance through work?
    - Do you go through the marketplace?
  - **Umbrella Coverage**
    - Is there a Need?
  - **Business Insurance**
    - Do you own a rental property or business?
    - Type of business and coverage amount?
    - Business Life Insurance?
- **Review Options to meet any needs not currently being met**

## REFERRALS

- Who in your life can benefit from the same value we provide you?
- Free Redbox Rental for you.