

# Review Checklist

## Family Status

| Since the last review (or within the past year) has...       | Yes | No | If yes, provide details |
|--|-----|----|-------------------------|
| A member of you immediate family married?                    |     |    |                         |
| A member of you immediate family separated or divorced?      |     |    |                         |
| A child (grandchild) been added to your immediate family?    |     |    |                         |
| A dependent or other person started living with your family? |     |    |                         |

## Health

| Since the last review (or within the past year) has/have... | Yes | No | If yes, provide details |
|---|-----|----|-------------------------|
| Your health substantially deteriorated?                     |     |    |                         |
| Your spouse's health substantially deteriorated?            |     |    |                         |
| A dependent been seriously injured or handicapped?          |     |    |                         |
| You started caring for an aging relative?                   |     |    |                         |

## Employment and Business Interests

| Since the last review (or within the past year) has/have... | Yes | No | If yes, provide details |
|---|-----|----|-------------------------|
| Your employment situation has significantly changed?        |     |    |                         |
| An immediate family member changed employment?              |     |    |                         |
| Your place of employment changed their retirement plan?     |     |    |                         |
| You started a new business?                                 |     |    |                         |

## Wealth Variations

| Since the last review (or within the past year) has/have... | Yes | No | If yes, provide details |
|---|-----|----|-------------------------|
| The value of your overall estate increased more than 10%?   |     |    |                         |
| Your or your spouse purchased or sold real-estate?          |     |    |                         |
| Your or your spouse received an inheritance?                |     |    |                         |
| Your or your spouse received a legal settlement?            |     |    |                         |
| Your or your spouse received a large bonus at work?         |     |    |                         |

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## Retirement

| Since the last review (or within the past year) has/have... | Yes | No | If yes, provide details |
|---|-----|----|-------------------------|
| Your group insurance benefits changed?                      |     |    |                         |

| Please answer the following questions  | Yes | No |
|--|-----|----|
| I would like to change the beneficiary on an annuity, investment, or life insurance policy   |     |    |
| I feel I need additional insurance   |     |    |
| I would like information about; IRA's, Roth IRA's, Annuities, 401(k)'s, and pension planning |     |    |
| I would like to start my own individualized private retirement program                       |     |    |
| Your or your spouse received a large bonus at work   |     |    |
| My spouse and I are concerned about the reduction in Social Security benefits                |     |    |