

*Life Review*  
**Fact Finder**

When life changes, it's important to review your life insurance needs. Please provide the information on this fact finder form to help your financial professional ensure that your policies are up to date with your current goals. If you prefer, your financial professional can help you gather policy information from your insurance carriers.

<b>Name</b>		<b>Age</b>	
<b>Marital Status</b>		<b>Number of children, if any</b>	

<b>Recent Lifestyle and Family Changes</b>	
Are you recently married, divorced, or widowed?	
Any changes in income including salary or inheritance?	
Do you need to fund retirement or college education?	
Did you purchase or sell a home?	
Did you start or sell a business?	
Have any children been added to or left the household?	
Are you caring for a special needs child?	
Are you the caretaker of a parent or relative?	

<b>Life Insurance Policy Information</b>	
Do you currently own any life insurance policies?	
If yes, when were they purchased?	
Have your policies been reviewed?	
Why was this coverage purchased?	
Has your health changed since the coverage was purchased?	
Were you a smoker, and if so, have you recently stopped?	

	Policy 1 Details	Policy 2 Details	Policy 3 Details
Carrier			
Policy #			
Owner			
Insured			
Beneficiary			
Policy Type			
Date of Issue			
Death Benefit			
Annual Premium			
Surrender Penalty Period, if any			
Cash Value			
Outstanding Loan Amount			
Years to Pay			
Riders			
Purpose of Insurance			

	Policy 4 Details	Policy 5 Details	Policy 6 Details
Carrier			
Policy #			
Owner			
Insured			
Beneficiary			
Policy Type			
Date of Issue			
Death Benefit			
Annual Premium			
Surrender Penalty Period, if any			
Cash Value			
Outstanding Loan Amount			
Years to Pay			
Riders			
Purpose of Insurance			