



# Taking Another Look

## Policy Review Analysis Worksheet

Use this worksheet to capture key information about your clients' life insurance policies and financial goals as you conduct periodic policy reviews and explore potential enhancements in coverage.

### CLIENT INFORMATION

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Male Female

Tobacco use: Yes No

Type \_\_\_\_\_ Frequency \_\_\_\_\_

Risk Class (select one):

Super Preferred Preferred Standard Plus Standard

Health Concerns:

### SPOUSE INFORMATION *if applicable*

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Male Female

Tobacco use: Yes No

Type \_\_\_\_\_ Frequency \_\_\_\_\_

Risk Class (select one):

Super Preferred Preferred Standard Plus Standard

Health Concerns:

### POLICY REVIEW OBJECTIVES *(please attach a copy of a current inforce illustration or statement)*

Desired outcome: More death benefit Lower premium Extended coverage period

Other (please specify) \_\_\_\_\_

Approximate household income \$ \_\_\_\_\_ Approximate net worth \$ \_\_\_\_\_

### OTHER INFORMATION

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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