

Life Check-Up: Prospecting Form



Rep Name: _____

Rep Phone: _____

A life insurance review may be appropriate for clients who have:

- A small or large business
- Recently married or divorced
- Purchased a new home
- Given birth or adopted a child
- Single or dual income households
- Received a significant salary increase
- Group life insurance coverage but do not have individual coverage
- Term insurance and may need to consider permanent insurance
- Concerns about having enough cash flow during retirement
- The need to transfer assets to heirs
- Estate tax concerns

Prospects				
Client Name	Married or Single	No. of Children	Amount of Current Coverage	Life Insurance Objectives
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
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_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

If you have any questions, contact your Protective Life representative or Dedicated Life Consultant.

To access a full list of Life Check-Up materials and resources, please visit www.myprotective.com/lifecheckup.

The tax treatment of life insurance is subject to change. Neither Protective Life nor its representatives offer legal or tax advice. Clients should consult their legal or tax advisor regarding their individual situation before making any tax related decisions.