

Ideal Client Worksheet

Did you know that your existing clients offer an abundant source of untapped life insurance opportunities?

In fact, a policy review — or Life Check-Up — may be appropriate for those who have experienced any of the following lifestyle changes:

- Marriage or divorce
- Purchasing a new home
- Childbirth or adoption
- A new job or career change
- Significant changes in their income
- Starting or owning a business
- Financial support of an elderly parent(s)
- Nearing retirement

Use this worksheet to identify potential Life Check-Up prospects from your current book of business.

IDENTIFIED PROSPECTS				
Client Name	Married or Single	Number of Children	Current Coverage Amount	Life Insurance Objectives

Additional information on next page.

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Contact your Protective Life representative or Dedicated Life Consultant for help uncovering new opportunities within your current book of business.

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