

PEACE OF MIND FINANCIAL CHECKLIST



Sometimes a second look makes all the difference.



1 PROTECT THE PEOPLE WHO MATTER

- ✓ Do you have enough life insurance for the people who depend on you?
- ✓ Has your coverage kept pace with changes in your life?
- ✓ Would your family know where to find your important documents?
- ✓ Are your beneficiaries and emergency contacts up to date?



2 PREPARE FOR FINAL EXPENSES

- ✓ Have you considered how funeral and final expenses would be handled?
- ✓ Would your family have immediate access to money when they need it?
- ✓ Have you documented your wishes and shared them with someone you trust?
- ✓ Could existing life insurance leave other financial needs uncovered?



3 PLAN FOR FUTURE CARE NEEDS

- ✓ What would happen financially if you needed help at home?
- ✓ Have you considered the potential cost of non-medical home care?
- ✓ Would family members be expected to provide or coordinate your care?
- ✓ Have you explored ways to prepare for future care expenses?



4 STRENGTHEN YOUR FINANCIAL FOUNDATION

- ✓ Do you have an emergency fund for unexpected expenses?
- ✓ Are monthly debt payments putting unnecessary pressure on your cash flow?
- ✓ Could your income withstand an extended illness, injury or other interruption?
- ✓ Are there financial risks you've been meaning to address but haven't?



5 LOOK AHEAD TO RETIREMENT

- ✓ Do you know where your retirement income will come from?
- ✓ Are you comfortable with how much of that income is guaranteed?
- ✓ Have inflation, taxes and longevity been considered?
- ✓ Is your current strategy still appropriate for your goals and timeline?
- ✓ When was the last time you gave your retirement strategy a second look?



ELLIOT GLASS

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PEACE OF MIND STARTS WITH THE RIGHT QUESTIONS.



You don't need to have everything figured out.

Use this checklist to identify the areas that deserve another look. If you find something you're unsure about, I'm available to help you understand your options.



No pressure.
No obligation.
**Just a second
set of eyes.**

YOUR SECOND-LOOK QUESTIONS



What keeps you up at night financially?



What's changed in your life since you last reviewed your coverage or financial plans?



What's the one financial question you've been putting off?



**PLAN TODAY.
PROTECT TOMORROW.
LIVE WITH CONFIDENCE.**



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