Are Clients in Good Financial Health?

Find Out with an Insurance Checkup and Open the Door to More Life Insurance Sales!

Although clients already have life insurance, you can help them be sure they have the coverage they want. Offer them an Insurance Checkup. Simply ask them, "When was the last time you reviewed your life insurance policies? Do the policies still match your financial goals?"

What is an Insurance Checkup?

Basically, you will be reviewing clients' current coverage and assessing any life changes that have taken place since the policy or policies were issued. You help the client determine if the insurance still meets the client's financial goals. The enclosed brochure and worksheet offer step-by-step details to complete the review, plus questions to ask clients during the Insurance Checkup.

Give clients assurance and grow your business.

Offer a complimentary Insurance Checkup today. This Insurance Checkup kit has all the pieces you need to get started.

See the reverse side of this flyer for a complete list of materials.

Life insurance policies issued by Transamerica Life Insurance Company, Cedar Rapids, IA 52499.
Policies may not be available in all jurisdictions.

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Transamerica Life Insurance Company

Item	Description
Producer Brochure	Details on how to complete an Insurance Checkup.
Consumer Brochure	Explains the need for an Insurance Checkup to clients and the steps involved.
Consumer Worksheet	Fill-in form for policy information, questions, and coverage estimate.
Client Pre-Approach Letter	Includes offer to client for complimentary Insurance Checkup.
Producer Prospect Tracking Sheet	Fill-in form to track your Insurance Checkup prospects.
Examples	Insurance Checkup examples.
Phone Script	Client phone call script.
Owner and Beneficiary Chart	Chart outlining possible life insurance owners and beneficiaries.

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