

# Client review

## Client profile

**Name:** \_\_\_\_\_ **Agent code:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **MGA:** \_\_\_\_\_

Not only does life change, but life insurance products change over time. That's why it's important for you to have a regular client review practice in place. Trust, credibility, and long-term relationships are just the beginning to the benefits of scheduling reviews.

### Help your clients keep their life insurance protection current

*If your clients have any of these life changing events...*

- New child or grandchild
- New job
- Inheritance
- Major investment gain/loss
- Health concerns
- Change in marital status
- Change in estate plan
- Sales or purchase of a home
- Start/purchase a business
- Sold or acquired assets
- Death of family member
- New investments
- Retirement
- Gain/loss of business partner



*... It may be time to schedule a North American client review.*

List the names of five clients who fit the above profile and whom you would like to help meet their life insurance needs and financial goals.

<b>Client name:</b> _____	<b>Age:</b> _____	<b>Gender:</b> _____	<b>Tobacco:</b> Y/N	<b>State:</b> _____
<b>Premium amount:</b> _____	<b>Retirement age:</b> _____	_____	_____	_____

  

<b>Client name:</b> _____	<b>Age:</b> _____	<b>Gender:</b> _____	<b>Tobacco:</b> Y/N	<b>State:</b> _____
<b>Premium amount:</b> _____	<b>Retirement age:</b> _____	_____	_____	_____

  

<b>Client Name:</b> _____	<b>Age:</b> _____	<b>Gender:</b> _____	<b>Tobacco:</b> Y/N	<b>State:</b> _____
<b>Premium amount:</b> _____	<b>Retirement age:</b> _____	_____	_____	_____

  

<b>Client Name:</b> _____	<b>Age:</b> _____	<b>Gender:</b> _____	<b>Tobacco:</b> Y/N	<b>State:</b> _____
<b>Premium amount:</b> _____	<b>Retirement age:</b> _____	_____	_____	_____

  

<b>Client Name:</b> _____	<b>Age:</b> _____	<b>Gender:</b> _____	<b>Tobacco:</b> Y/N	<b>State:</b> _____
<b>Premium amount:</b> _____	<b>Retirement age:</b> _____	_____	_____	_____

Sammons Financial® is the marketing name for Sammons® Financial Group, Inc.'s member companies, including North American Company for Life and Health Insurance®. Annuities and life insurance are issued by, and product guarantees are solely the responsibility of, North American Company for Life and Health Insurance.