

Insurance Review Checklist

Your Journey. Your Goals. Your Summit.

Use this worksheet as an educational starting point. Add notes that reflect your household.

☐ **Household income responsibilities**

☐ **Mortgage and other debt**

☐ **Dependents and education goals**

☐ **Existing coverage and beneficiaries**

☐ **Employer-provided coverage**

☐ **Policy ownership and costs**

☐ **Questions for a licensed professional**
