

NAME: _____ PHONE: _____

ADDRESS: _____

EMAIL: _____

PLEASE MARK ALL PRODUCTS THAT YOU WOULD LIKE TO DISCUSS IN YOUR APPOINTMENT TODAY:

- ☐ **On-Track Retirement Planning**
 - Income Planning
 - Market Safe Accounts
 - Proactive Tax Planning & Tax Free Retirement
 - Asset Protection & Estate Planning
 - Care plan for Health & Long-Term Care
 - Transparency & Low Investment Fee
- ☐ **Long Term Care**
 - Traditional Long-Term Care Insurance
 - Hybrid LTC & Life Insurance
 - Annuities with LTC Benefits
- ☐ **Life Insurance**
 - Term Life (1, 5, 10, 15, 20, 25, 30 Years)
 - Universal Life (UL, GUL, IUL)
 - Whole Life (Final Expense, Traditional)
 - Mortgage Protection
 - Funeral & Burial Plans
- ☐ **Disability**
 - Individual
 - Business Overhead Expense Coverage
 - Key Employee
- ☐ **Employee Benefits**
 - Life, Accident, Hospital, Cancer, etc. & Dental & Vision
- ☐ **Business Owners**
 - Buy-Sell Agreement
 - Business Succession Planning
 - Key Employee Coverage
 - Key Person Insurance
 - Buy-Sell Agreement Funding
 - Loan Collateral
 - Estate Planning & Succession Planning
 - Debt Protection
 - Executive Bonus Plans
- ☐ **Medicare Advantage Plans**
 - Most Plans are Zero Premium
 - Extra Benefits (dental, vision, hearing, OTC, gym membership, etc.)
 - Network Based
 - Plans based on county
- ☐ **Medicare Supplements**
 - Plan G - Pays 100% of Medicare Approved Charges After Part B Deductible
 - NO Networks
- ☐ **Prescription Drug Plans**
 - Plans vary based on county and prescriptions
- ☐ **Health Insurance**
 - On / Off Exchange
 - Christian Health Share
 - Short Term Medical
 - Group Health
- ☐ **Hospital Indemnity Plans**
 - Reimburses for Hospital Stays, Ambulance, Emergency Room, etc.
- ☐ **Critical Illness**
 - Cancer, Heart Attack, Stroke, etc.
- ☐ **Dental, Vision, Hearing**
 - Can be Individual or Combined Together
- ☐ **Accidental Medical / Accidental Death**
 - Benefits Paid in the Event of an Accident
- ☐ **Property & Casualty**
 - Personal (Home, Auto, Renters, Umbrella, Motorcycle, Rec. Vehicle, Watercraft, Pet)
 - Commercial (Business Auto, General / Professional Liability, Workers Comp, Business Owners Package, Bonds, EPLI)