

Since you last insurance checkup, have you or would you:

YES NO

- | | | |
|---|-----|-----|
| 1. Added to your family? | () | () |
| 2. Like to review how your life insurance will help | () | () |
| 3. Consider increasing your life insurance? | () | () |
| 4. Consider converting any term insurance? | () | () |
| 5. Consider increasing your disability insurance? | () | () |
| 6. Consider insurance on children or grandchildren? | () | () |
| 7. Had a loved one diagnosed with a critical illness? | () | () |
| 8. Started or changed your pension plan at work? | () | () |
| 9. Any need to change beneficiaries? | () | () |
| 10. Any need for other policy changes? | () | () |
| 11. Would you like to discuss the advantages of trusts? | () | () |
| 12. Acquired any new group insurance? | () | () |
| 13. Acquired any new disability (loss of income) insurance? | () | () |
| 14. Acquired any additional personal assets? | () | () |
| 15. Acquired additional real estate? | () | () |
| 16. Received any inheritance (you or your spouse)? | () | () |
| 17. Entered into a new business venture? | () | () |
| 18. Changed your occupation? | () | () |
| 19. Changed attorneys, banks, accountants etc? | () | () |
| 20. Changed your mailing address? | () | () |
| 21. Changed your will or need to change your will? | () | () |

**If you answered yes to any of these questions, please contact Travis Strain,
either via email - mail@travisstrain.ca or phone - (604) 308-6030**