



# INSURANCES CHECKLIST

HEAD AND HEART ESTATE PLANNING

## FINANCIAL SECURITY FOR YOUR LOVED ONES IS AN IMPORTANT PART OF ESTATE PLANNING

Complete this self-audit and take action!

INCOME PROTECTION

TOTAL & PERMANENT DISABILITY

TRAUMA (YOU & KIDS)

LIFE INSURANCE

UNDERSTAND IT

HAVE IT & HAPPY

HAVE IT, BUT NOT ENOUGH

NEED IT

### HELP I NEED:

UNDERSTANDING WHAT & WHY (WITHOUT BEING SOLD TO)

UNDERSTANDING THE PROCESS & COST

UNDERSTANDING HOW MUCH COVER I SHOULD HAVE

UNDERSTANDING WHERE IT SHOULD BE PAID (MY ESTATE OR OTHER?)

A REFERRAL TO A TRUSTED FINANCIAL PLANNER

### RESOURCES:

HEAD AND HEART LIVING FACEBOOK GROUP- [JOIN HERE](#)

(We covered this topic in March 2020, and have saved all the videos as a unit called "Insurances".

BOOK A FREE 15 MINUTE CHAT- [BOOK HERE](#)

With Principal lawyer, Lucy Percy to ask me anything.