

I hope all is well with you and your family in these trying economic times. Even in good times, having a review of your current insurance program to make sure coverage are in line with your goals and life changes is a prudent step. I would like to schedule a meeting with you to review your current insurance situation.

Customer Name _____

Over the past couple of years, I have come across some value-added products that may be of interest to you. I have personally used many of these and can provide you with valuable information to make an informed decision that benefits you and your family.

Please check areas that may be of interest when we meet:

- | | |
|---|--|
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Accelerated Mortgage Payoff |
| <input type="checkbox"/> Disability Income Insurance | <input type="checkbox"/> Business Insurance including Worker's Compensation |
| <input type="checkbox"/> Health Insurance | <input type="checkbox"/> Investment Planning |
| <input type="checkbox"/> Long-term Care Insurance | <input type="checkbox"/> Child Education Funding |
| <input type="checkbox"/> Legal Protection | <input type="checkbox"/> College Planning Education |
| <input type="checkbox"/> Identity Theft Protection | <input type="checkbox"/> Tax Preparation |
| <input type="checkbox"/> Wills/Health Directive Info | <input type="checkbox"/> Accounting Service |
| <input type="checkbox"/> Debt Elimination/Equity Acceleration | <input type="checkbox"/> Jewelry or Expensive Collections to Schedule on Home Policy |

Changes—in the next year I plan to:

- | | | | |
|---------------------------------------|---|--|--|
| <input type="checkbox"/> Graduate | <input type="checkbox"/> Child Starts Driving | <input type="checkbox"/> Buy Property | <input type="checkbox"/> Make a Major Purchase |
| <input type="checkbox"/> Get Married | <input type="checkbox"/> Child Graduates | <input type="checkbox"/> Sell Property | <input type="checkbox"/> Retire |
| <input type="checkbox"/> Buy a Home | <input type="checkbox"/> Change Jobs | <input type="checkbox"/> Sell Business | |
| <input type="checkbox"/> Have a Child | <input type="checkbox"/> Start a Business | | |

Please update the following information for our files—Names of all family members and their birthdays:

Name	Birthday	Name	Birthday
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Address: _____ **City:** _____ **Zip Code:** _____

Wedding Anniversary Date: _____ **Email Address:** _____

Please email or fax completed form to me and I will then call to schedule a consultation time to review your current situation. I truly appreciate your business and I wish you and your family the best in 2012.

Sincerely,

Terry Templin
Insurance Advisor

Representing

