



TARGET AND TRACK YOUR PROSPECTS

Use the information below to help you target and track clients who are good prospects for an insurance checkup.



Please note that these are only guidelines to help you determine those clients who may benefit from an insurance checkup. Your prospects may include individuals who do not fall into any of these particular categories.



Insurance Checkup Prospect Profile

- 45-65 years old
- Owns a policy that is at least 3 years old
- In good health
- Has estate planning issues
- Owns a small business
- Has had recent life or financial changes

To find out more about clients' individual needs, help them complete an *Insurance Checkup Worksheet*.

Important areas to explore with clients:

- Do existing policies coincide with current goals?
- Have financial objectives changed since the client bought the life insurance policy(ies)?
- Are term policy premiums about to increase?
- Do client's long-term goals require a permanent policy?

Life insurance policies issued by Transamerica Life Insurance Company, Cedar Rapids, IA 52499. Policies may not be available in all jurisdictions.



Transamerica Life Insurance Company

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