

### Annual Review Checklists

In our experience, most insurance advisors can efficiently manage a client base of 150 people. Once that number is reached, they need to hire assistants and/or systemize their practice to run more effectively.

Keeping in touch with your clients is something you promised to do when you sold them their first policy. In addition, timing is a very important factor in the financial services industry and opportunities can be lost for advisors who do not maintain regular contact.

There are many client management systems available on the market. You get what you pay for with these systems. If you buy cheap, the training and support component will be limited. On the other hand, you may find some client management systems are far too complex for your needs. Take the time to research your options if you are in the market for a new system.

In the meantime, keep in touch with your clients and send them a letter annually with a review checklist enclosed. You never know what their circumstances are when your letter arrives on their doorstep. A checklist is also a very unobtrusive way to let your clients know what other financial services products you can provide them with.

- ◇ Are they thinking of you as their life insurance agent and someone else as their investment advisor?
- ◇ Do they know you can offer them critical illness insurance products?
- ◇ Are they ready to review their retirement needs now?

The attached tool could help you stay in touch with your clients and keep your name in front of them when new financial needs arise. Personalize it to your practice, include it in a quick letter to your clients, and follow up with a phone call.

## Review Checklist

Your Name \_\_\_\_\_ D.O.B. \_\_\_\_\_  
Address \_\_\_\_\_ New? Yes\_\_\_\_ No \_\_\_\_  
\_\_\_\_\_ Telephone # \_\_\_\_\_  
E-Mail Address \_\_\_\_\_

### Since our last review I have or will have:

	Yes	No
1) Added to my family	___	___
2) A need to change my beneficiary	___	___
3) Changed my marital status	___	___
4) Invested in business	___	___
5) Acquired, paid off or disposed of properties	___	___

### I am interested in information on:

___ Increasing Protection for my family	___ Insuring my spouse/children
___ Purchasing/increasing protection if I become disabled	___ Financial and Investment Planning
___ Looking into a Critical Illness Plan	___ Tax and Estate Planning
___ Looking into a Long Term Care Plan	___ Retirement Planning

I would appreciate a call from you to review my policy (ies) Yes\_\_\_\_ No \_\_\_\_