

Life events checklist

Have your needs changed?

A periodic review and analysis of your life insurance needs is an important part of your financial protection. Have your needs changed since purchasing the policy? Is the policy still performing according to expectations and meeting financial goals? To determine how to help meet your financial goals, please complete the form below.

| Common life events | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| □ New child or grandchild □ New job or promotion □ Inheritance □ Major investment gain/loss □ Health concerns | ☐ Change in marital status ☐ Change in estate plan ☐ Sale or purchase of home ☐ Start/purchase a business | □ Death of family member □ New investments □ Retirement □ Gain/lost business partner □ Sold or acquired assets |
| Areas of interest or concer | rn | |
| Retirement planning Estate planning Business/executive benefits Additional comments and | ☐ College funding ☐ Planning for parents ☐ Business continuation notes: | Survivor benefit planning Other: |
| Contact information: | | |
| Name: | Address: | |
| Phone: | Best time to call: | |
| Email: | | |

Neither Midland National Life Insurance Company nor its agents give legal or tax advice. Please consult with and rely on a qualified legal or tax advisor before entering into or paying additional premiums with respect to such arrangements.

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