Beneficiary & Protection Review Checklist

Understand what protects the people and progress that matter.

Pillar: Protect

A Protect resource for reviewing beneficiaries, life changes, insurance awareness, and risk conversations without making product recommendations.

Action Checklist

- ☐ 1. Review beneficiaries on major accounts.
- ☐ 2. List major life changes since the last review.
- ☐ 3. Clarify the purpose of existing coverage.
- ☐ 4. Write down questions for licensed professionals where needed.

Notes

Next Steps

Take the Legacy Ready Assessment. Explore Resources. Explore Financial Bliss Academy. Bring Legacy Ready to Your Organization.

Disclaimer

This resource is provided for general educational and informational purposes only. It does not constitute individualized financial, investment, insurance, tax, estate-planning, or legal advice. Financial and legal circumstances vary. Consult appropriately qualified professionals regarding decisions specific to your circumstances.

Insurance information is educational and does not determine product suitability, coverage adequacy, or required policy amounts. Insurance products and services are offered only through appropriately licensed entities and professionals.