

Beneficiary audit – service process



Step 1 – Are the Beneficiaries correct on all documents – insurance investments company documents – pensions property and aligned with will?



Step 2 – Are the Secondary or contingent beneficiaries correct – trusts etc.



Step 3 – Net worth summary – all documents found and organized

Key question: Can you do the proper review of life insurance without doing a beneficiary audit and needs analysis?



Step 4 – Clarity around their future WITHOUT giving solutions or advice.



Step 5 – Implementation strategy and your advice
Put together a written implementation schedule

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