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## LIFE INSURANCE CHECKLIST

PLEASE BRING THE  
FOLLOWING TO  
OUR MEETING

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### **Helpful things to have at our meeting: (bring what you can)**

Piece of identification

Gather and bring any Policies you currently have

Find out if you carry Mortgage Life Insurance in your mortgage

Doctors contact information

Dates of your last doctors visits

Any medications you are taking

Any known health conditions

Who you want to receive the proceeds of your Life Insurance Policy (Beneficiaries)

VOID Cheque/PAD/Direct Deposit Information for payment of premium