

Life Insurance Checklist

Choosing to invest in protecting your future can feel like a big decision—but with numerous benefits, it can be a great one. Make sure you have everything you need for a smooth application with this checklist.

1 What are your existing financial responsibilities?

For example, debts such as mortgages, loans, and credit cards, or ongoing payments, like household costs and education fees:

	\$
	\$
	\$
Total Debt	\$

	\$
	\$
	\$
Total Monthly Payments	\$

2 What are your future anticipated financial expenses?

For example, higher education expenses, vehicles, or weddings:

	\$
	\$
	\$
	\$
Total Cost	\$

3 What are your existing assets?

For example, IRAs, 401(k), and savings:

	\$
	\$
	\$
	\$
Total Cost	\$

4 Who do you want to protect?

☐ Spouse/domestic partner ☐ Children/other dependents

5 How do you anticipate your insurance benefit being used?

For example, for funeral expenses, future college tuition, or paying the current mortgage:

6 What type of policy do you plan to apply for?

☐ Term ☐ Term Step Rate ☐ GVUL ☐ Spouse

7 What is your planned coverage amount?

Consider your total costs from questions 1 – 3, or visit cpai.com/lifeneeds for a needs estimate.

8 Which riders or options do you require as part of your policy?

- ☐ Optional Dependent Child Coverage
☐ Accelerated Death Benefit Option for Terminal Illnesses
☐ Optional Accidental Death & Dismemberment (AD&D) Coverage
☐ Optional Waiver of Premium

9 Prepare for your application with the following:

- ☐ Social Security Number
☐ Health and medical history, including dates of any surgeries/diagnoses
☐ A list of any extreme hobbies (skydiving, rock climbing, etc.)
☐ Primary physician's information
☐ Employment and AICPA membership information
☐ Beneficiary legal name(s)
☐ Beneficiary mailing address(es)
☐ Beneficiary date(s) of birth
☐ Payment frequency (you may find advantages to paying annually, rather than monthly; visit cpai.com/save for more information)
☐ Banking information, including account and routing numbers, bank name, and bank address

Questions?

Call 800.223.7473. We're available
8:30am–6pm ET, Monday–Friday.

→ cpai.com/life

IMPORTANT NOTICE — Please visit www.cpai.com/mib.

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