

LIFE INSURANCE

Life Insurance

Protection for the people who matter most.



“A small act of preparation today can make a world of difference tomorrow.”

PRIMARY LIFE INSURANCE POLICY

List your main life insurance policy details.

Insurance Company:

Type of Policy: ☐ Term ☐ Whole ☐ Universal ☐ Other:

Policy Number:

Owner (if different):

Insured:

Death Benefit Amount: \$

Issue Date:  Term Length (if applicable):

Premium Amount: \$  ☐ Monthly ☐ Quarterly

☐ Semi-Annual ☐ Annual

Payment Method:

Beneficiary(ies):

Living Benefits (if any):

Notes:

ADDITIONAL LIFE INSURANCE POLICIES

List any additional policies (employer, individual, etc.).

| Insurance Company | Type of Policy | Policy Number | Death Benefit | Premium (Amount & Frequency) | Beneficiary(ies) | Notes |
|-------------------|----------------|---------------|---------------|------------------------------|------------------|-------|
|                   |                |               |               |                              |                  |       |
|                   |                |               |               |                              |                  |       |
|                   |                |               |               |                              |                  |       |

EMPLOYER-PROVIDED LIFE INSURANCE

Employer Name:

Coverage Amount: \$

Type of Coverage: ☐ Basic ☐ Supplemental

Is Coverage Portable? ☐ Yes ☐ No ☐ Unknown

Notes:

BENEFICIARY REVIEW

Keep your beneficiaries up to date.

☐ Confirm your beneficiaries are current.

☐ Review after major life events (marriage, divorce, birth, etc.).

☐ Make sure contingent beneficiaries are listed.

☐ Keep a copy of beneficiary information with your important documents.

☐ Consider reviewing with a trusted advisor.

ADDITIONAL NOTES

Use this space for any additional information, questions, or reminders.



GAVREL FAMILY PLANNING KIT

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**This worksheet is from the  
Gavrel Family Planning Kit.**

*Get the full kit free at*

**GavrelGuidance.com**

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*Honor Your Past. Protect Your Present. Prepare Your Future.*