INSURANCE CENTER

Services we provide -	Need: Yes	No
Life Insurance	☐	☐
Long Term Care	☐	☐
Medicare Supplements	☐	☐
Medicare Advantage & Plan D	☐	☐
Disability Income	☐	☐
Individual Health	☐	☐
Group Health	☐	☐
Dental - Individual & Group	☐	☐
Annuities - IRA, SEP, Roth	☐	☐
Retirement Plans	☐	☐
Legal assistance with Prepaid Legal	☐	☐
Identity Theft Protection	☐	☐
Auto & Home Insurance	☐	☐
Commercial Liability	☐	☐

Your Services

_____	☐	☐
_____	☐	☐
_____	☐	☐
_____	☐	☐
_____	☐	☐
_____	☐	☐
_____	☐	☐
_____	☐	☐