CHECKLIST · FINANCIAL MANAGEMENT

FREE PREVIEW

Evaluating Insurance Needs



Having the right insurance coverage protects you from unexpected financial burdens. Use this checklist to evaluate and update your insurance policies.

10 steps · Print-ready A4

NAME	START	TARGET DATE

1 Review Your Current Policies

List all active insurance policies, including health, auto, home, and life.

TIP *Keep a digital or physical file with policy details for easy access during reviews.*

2 Assess Life Changes

Consider recent changes like marriage, children, or a new job that may require updates.

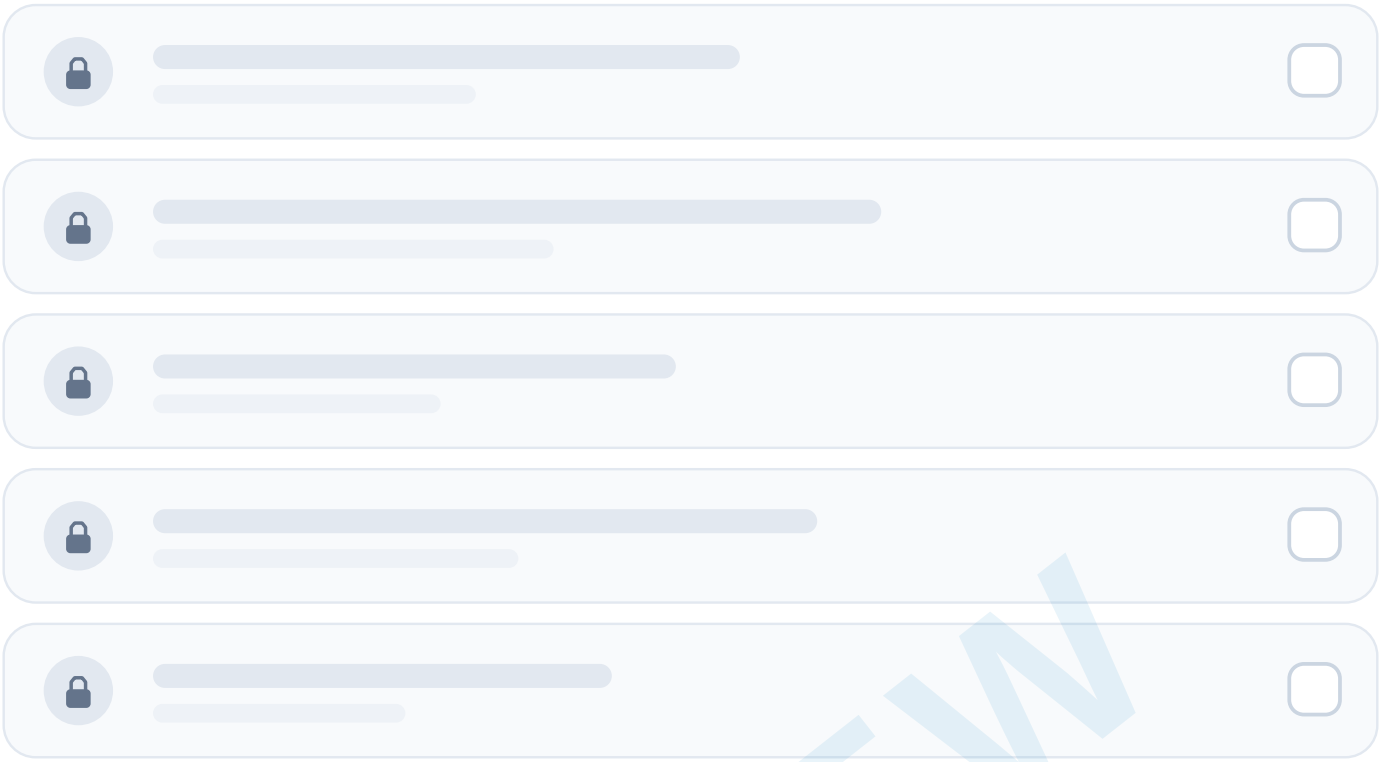
EXAMPLE *“After buying a new home, I need to update my homeowner’s insurance policy.”*

3 Determine Coverage Gaps

Identify areas where you lack sufficient protection.

EXAMPLE *“I don’t have disability insurance for income protection or sufficient coverage for high-value electronics.”*

PREVIEW



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