

INSURANCE TRACKER

Completed: Date

LIFE INSURANCE

GROUP PLANS		Name		Name	
		Coverage (\$)	Age Limit	Coverage (\$)	Age Limit
Basic	- Employee	\$0	Age 65		
Optional	- Employee				
Basic Dependent	- Spouse				
Optional Dependent	- Spouse				
Optional	- Spouse				
Basic Dependent	- Child(ren)				
Optional Dependent	- Child(ren)				
Optional	- Child(ren)				

INDIVIDUAL PLANS		Coverage (\$)	Age Limit	Insurer	Policy #	Phone
Permanent (Whole Life / Universal Life)	Name	WL: \$0	Age 65	Insurer	#	#
Term	Name	T-10: \$0	Age 65	Insurer	#	#

CRITICAL ILLNESS INSURANCE

GROUP PLANS		Name		Name	
		Coverage (\$)	Age Limit	Coverage (\$)	Age Limit
Basic	- Employee	\$0	Age 65		
Optional	- Employee				
Basic	- Spouse				
Optional	- Spouse				
Basic	- Child(ren)				
Optional	- Child(ren)				

INDIVIDUAL PLANS		Coverage (\$)	Age Limit	Insurer	Policy #	Phone
Critical Illness	Name	\$0	Age 65	Insurer	#	#

DISABILITY INSURANCE

GROUP PLANS		Name		Name	
		Coverage (\$)	Age Limit	Coverage (\$)	Age Limit
Long-Term - Taxable	- Employee	\$0	Age 65		
Long-Term - Non-Taxable	- Employee				

INDIVIDUAL PLANS		Coverage (\$)	Age Limit	Insurer	Policy #	Phone
Disability Insurance	Name	\$0	Age 65	Insurer	#	#

MORTGAGE PROTECTION INSURANCE

	Coverage (\$)	Age Limit	Insurer	Policy #	Phone
Mortgage Protection Insurance - Life (Total)	\$0	Age 65	Insurer	#	#
Mortgage Protection Insurance - Disability (Monthly)					