

INSURANCE TRACKER

Completed: _____

LIFE INSURANCE

GROUP PLANS		Coverage (\$)	Age Limit	Coverage (\$)	Age Limit
Basic	- Employee				
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)						
Term						

CRITICAL ILLNESS INSURANCE

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

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

DISABILITY INSURANCE

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

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

MORTGAGE PROTECTION INSURANCE

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