



Yes Life Annual Review Checklist

Being risk averse crucial, but what even more important is, that our advice suits your current circumstances, help us making sure that is the case and answer the following questions:

1) Any Changes to contact details?

Yes/No

2) Any slight improvement or deterioration in your and/or your family's health?

Yes/No

3) Any changes from your current address?

Yes/No

4) Achange in your mortgage balances?

Yes/No

5) A change in your debt levels or credit card limits?

Yes/No

6) Any change in your family structures?

(This includes any of the following)

Change in relationship status

Any addition to the family (Children or Dependents)

Relocation of household members

Passing away of family member

7) Any change in employment status, employer or profession for:

Salary/Wages

8) Do you intend on buying or selling a property in short term or long term?

Yes/No

9) Do you still understand the cover you have in place and feel it is adequate based on your current circumstances?

Yes/No

10) Would like to discuss your insurance in further detail?

Yes/No

11) Are you happy with your current Kiwisaver balance?

Yes/No

12) Would like to increase your Kiwisaver contribution/change your fund type?

Yes/No

13) Are you planning to relocate to overseas?

Yes/No

14) Are you experiencing financial hardships?

Yes/No

15) Have you made a Will ?

Yes/No

Is there anything else you would like to talk about?

We want to make sure that your Financial advice is still in line with your current circumstances. We recommend having a catch up to ensure everything is still fit for purpose.

Would you like to book a Zoom review of your policy? If so, email us at service@yeslife.co.nz or simply reply YES & we will be in touch to arrange a mutually convenient time.

Team Yes Life