Mesirow Financial®

Annual Review Checklist

Once completed, please fax the below form to Dana Mikstay at 312-595-6279.

NAME:______________________________________ TELEPHONE:_________________

ADDRESS: ____

E-MAIL:_________________ FAX:_________________

Please review this list, checking items where applicable. We will contact you to discuss any planning techniques or ideas that may have an impact on your financial future.

The following changes have recently occurred:

- ❑ Purchased a new home
- ❑ Started a new business
- ❑ Taken on an associate
- ❑ Received a promotion
- ❑ Started a new job
- ❑ Changed marital status
- ❑ Drafted a new will
- ❑ Established a trust
- ❑ New group insurance
- ❑ New personal insurance
- ❑ New business insurance
- ❑ Children/Grandchildren

I am interested in discussing:

- ❑ Reviewing my present insurance program
- ❑ Additional life insurance
- ❑ Disability income protection
- ❑ Life insurance for my spouse
- ❑ Life insurance for my children
- ❑ Term insurance
- ❑ Converting term insurance
- ❑ Individual health insurance
- ❑ Long-term care insurance
- ❑ Mortgage insurance
- ❑ Group health insurance
- ❑ Group dental insurance
- ❑ Group life insurance
- ❑ Key person insurance
- ❑ Buy/sell funding
- ❑ New-qualified plans
- ❑ Pension, 401(k), Keogh, SERP
- ❑ IRAs and IRA rollovers
- ❑ Roth IRAs
- ❑ Financial planning
- ❑ Retirement planning
- ❑ Estate planning
- ❑ Business succession planning
- ❑ Joint life insurance
- ❑ College savings plan
- ❑ Annuities
- ❑ Mutual funds
- ❑ Systematic savings plans
- ❑ Other investments
- ❑ Property & Casualty insurance
- ❑ Homeowners/ Automobile insurance

Please list any changes or comments below:

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Name(s) and age(s) for insurance quote: ____

If you have any questions, please contact Dana Mikstay at 312-595-6157 (telephone), 312-595-6279 (fax) or dmikstay@mesirowfinancial.com.

- □ **Please call me**
- □ **Please send me information in the mail**