



Know Your Policy-Life Insurance

Complete the following worksheet for your life insurance policy in order to get to know it better. Knowing your policy will help you to maximize its benefit to you.

 Life Insurance 	
Company:	Agent Phone:
Agent:	Agent Email:
Policy Type	
Temporary (term)	
Permanent (cash value)	
Benefits	
Death Benefit	
Policy Loans	
Flexible Premium/Benefit	
Other	
Costs	
Annual Premium	
Annual Policy Fee	
Sales Charge	
Surrender Charge	
Other	
Limitations	
(Non) Standard Premiums	
Suicide Clause	
Other	

Source: Adapted from *DollarWorks* (University of Minnesota Extension)