

The FAMILY BENEFICIARY CHECKUP™

**SCHEDULE YOUR
30-MINUTE REVIEW**



Understanding your FEGLI:
Coverage Review

A Simple 10-Minute Family Check-In

Your FEGLI beneficiary designation determines who receives your FEGLI life insurance proceeds. If you haven't filed a designation, or if it's outdated, benefits may be paid according to FEGLI's order of **precedence**—not your current wishes.

Review it today to help protect the people who matter most. ❤️

1 QUICK CHECK: DO YOU KNOW...



How much FEGLI coverage you currently have? ☐ YES ☐ NO



Who is currently listed as your FEGLI beneficiary? ☐ YES ☐ NO



Where your beneficiary designation is kept? ☐ YES ☐ NO



When you last reviewed your beneficiary designation? ☐ YES ☐ NO

2 HAS ANYTHING CHANGED?

Check all that apply.



☐ Marriage



☐ Retirement



☐ Divorce



☐ Home purchase



☐ Birth of a child



☐ Significant increase in income



☐ Adoption



☐ Started a business



☐ Death of a beneficiary



☐ Created a trust



☐ New grandchild



☐ None of the above

3 THINK BEYOND "WHO"

Take a moment to reflect.



Is the person I chose still the person I want making financial decisions for my family? _____



Would my family know where to find my beneficiary information? _____



If my beneficiary received these funds tomorrow, would they know what to do next? _____



Have I coordinated my beneficiary choices with my estate plan? _____

4 ABOUT YOU

Name: _____

Agency: _____

Today's Date: _____

5 YOUR CONFIDENCE LEVEL

How confident are you that your beneficiary plan reflects your wishes today?



Very
Confident
☐



Somewhat
Confident
☐



Unsure
☐



I Need to
Review Everything
☐

6 QUESTIONS I'D LIKE ANSWERED



7 FAMILY ACTION PLAN

My next steps:



Review my current FEGLI coverage. _____



Update my beneficiary(ies) if needed. _____



Share important information with my family. _____



Coordinate this with my estate plan. _____



Schedule my 30-minute review to understand my FEGLI coverage. _____

8 FAMILY BLUEPRINT NOTES





*Peace of mind today.
Protection for tomorrow.*

A quick review today can help your family avoid confusion tomorrow.



PRIVATE FAMILY BLUEPRINT
Teaching families to make confident financial decisions before life forces difficult ones.



We believe families make their best financial decisions when someone takes the time to teach—not sell.

Private Family Blueprint
Educational Series

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