

Beneficiary audit – service process



Step 1 – Are the Beneficiaries correct on all documents – insurance investments company documents – pensions property and aligned with will?



Step 2 – Are the Secondary or contingent beneficiaries correct – trusts etc.



Step 3 – Net worth summary – all documents found and organized

Key question: Can you do the proper review of life insurance without doing a beneficiary audit and needs analysis?



Step 4 – Clarity around their future WITHOUT giving solutions or advice.



Step 5 – Implementation strategy and your advice
Put together a written implementation schedule

Harris Kagan, CLU, ChFC, RICP
Financial Adviser for Eagle Strategies LLC
Registered Representative for NYLIFE Securities LLC
(Member FINRA/SIPC), a licensed insurance agency.
Eagle Strategies LLC and NYLIFE Securities LLC are New York Life companies.
Agent, New York Life Insurance Company,

CA Insurance Lic. #0694597
1608 Pandora Ave., Los Angeles CA 90024
310-663-4637 hkagan@eaglestrategies.com