

Here For All Life's Moments, Big & Small

Insurance Policy Review



Is it Time for an Insurance Review?

Life changes quickly. That's why it's important to periodically evaluate your financial and life insurance needs. An insurance review can help you make sure your policies fit your current goals and financial plans. Your family's financial future is too important to leave to chance.

When was the last time you looked at your life insurance policies? How long ago were they purchased? Have there been any changes in your life or financial plans that might affect the amount of insurance coverage you desire? It may be time for an insurance review.

What to Look For

If you answer "yes" to any of the below questions, you may need to modify your insurance policies. Contact your SouthState Investment Services Financial Consultant today at (800) 382-0564 to schedule a review.

Changes in Beneficiaries

- Recent marriage or divorce?
- New child or dependent?
- Children grown and out of the house?
- Death of spouse or dependent?

New Debt

- Purchased a home?
- Started or own a business?
- Need to fund a higher education?

Changes In Your Financial Responsibilities

- Change in employment status or salary?
- Need to plan for retirement?
- Need to support anyone with special needs or an elderly family member?
- Received an inheritance?
- Concerned about the cost of long term care?

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