Email 3 - two weeks post class

*Topic: Compile your insurance + beneficiary information*

**Headline:** Understanding the Role of Insurance in Retirement Planning

[**name**],

As you’re thinking about the next steps for your retirement planning, don’t forget to consider how insurance comes into play. Have you reviewed your insurance plan and analyzed to see if you have enough coverage?

Here’s an insurance information checklist to help you determine what coverage you have right now, and how you might need to adjust for your retirement.

[**download**]

As always, I’m here to help. Please click my calendar link [**link**] to book a complimentary 1-1 with me and I can help walk you through this process step by step.