



Beneficiary Review



What is Beneficiary Review?

A service to help clients determine whether current beneficiary designations are in synch with disposition goals. American General Life Insurance Company (AGL) provides all the tools you need.

Beneficiary Review is a unique, non-threatening approach to existing clients and new prospects. By design, it involves collecting client data which may identify additional needs or coverage gaps.

You can easily complete the review yourself. When needed, our Advanced Sales team can help with beneficiary designations for complex situations.

Why offer the service?

Time and life events may cause changes in assets and disposition plans, making a periodic review important. Furthermore, collecting current client data offers an excellent opportunity to identify additional needs for the products you sell.

How does the process work?

- Identify current designations using data form
- Match them against client's goals
- Assist client in completion of changes, if needed
- Refer client to other advisors as appropriate
- Use data to determine needs for additional products and services

What is the target market?

Individuals, business owners and professionals with existing insurance and financial assets who have not recently reviewed beneficiary designations.

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Marketing Materials

[Financial Professional Guide](#)

[Consumer Financial Journal](#)

The Financial Professional Guide and the Consumer Financial Journal are available for order through Forms Depot via [Connex](#),

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