4. FINANCIAL PROTECTION CHECKLIST

Protect what matters most.

Protection today provides security for tomorrow, for you and the people you care about.

Life is full of uncertainties. The right protection in place today can prevent small problems from becoming large setbacks and protect your loved ones. Use this checklist to review your current protection and identify any gaps.

1. PERSONAL PROTECTION CHECK

Review the protection you have in place for yourself.
Tick the box that best describes your position.

PROTECTION TYPE	IN PLACE	NOT IN PLACE	NOT SURE	REVIEW NEEDED
Life Insurance	☐	☐	☐	☐
Critical Illness Cover	☐	☐	☐	☐
Income Protection	☐	☐	☐	☐
Private Medical Insurance	☐	☐	☐	☐
Personal Accident Cover	☐	☐	☐	☐
Long-Term Care Cover	☐	☐	☐	☐

Are there any areas above that concern you?

_____

_____

2. FAMILY PROTECTION CHECK

Review the protection that supports your family and loved ones.
Tick the box that best describes your position.

PROTECTION TYPE	IN PLACE	NOT IN PLACE	NOT SURE	REVIEW NEEDED
Life Cover for Family	☐	☐	☐	☐
Critical Illness Cover for Partner	☐	☐	☐	☐
Income Protection for Family	☐	☐	☐	☐
Children's Financial Security	☐	☐	☐	☐
Family Health Insurance	☐	☐	☐	☐
Dependants' Cover / Benefits	☐	☐	☐	☐

Are there any areas above that concern your family's security?

_____

_____

3. HOME & ASSET PROTECTION CHECK

Review the protection you have for your home and key assets.
Tick the box that best describes your position.

PROTECTION TYPE	IN PLACE	NOT IN PLACE	NOT SURE	REVIEW NEEDED
Buildings Insurance	☐	☐	☐	☐
Contents Insurance	☐	☐	☐	☐
Landlord Insurance	☐	☐	☐	☐
Car / Vehicle Insurance	☐	☐	☐	☐
Valuables / High-Value Items	☐	☐	☐	☐
Legal Expenses Insurance	☐	☐	☐	☐

Are there any important assets that are not adequately protected?

_____

_____

4. WILLS & ESTATE PLANNING CHECK

Ensure your wishes are known and your loved ones are protected.
Tick the box that best describes your position.

PROTECTION TYPE	IN PLACE	NOT IN PLACE	NOT SURE	REVIEW NEEDED
Will in Place	☐	☐	☐	☐
Will Reviewed in Last 3 Years	☐	☐	☐	☐
Lasting Power of Attorney	☐	☐	☐	☐
Healthcare Decision Recorded	☐	☐	☐	☐
Beneficiaries Up to Date	☐	☐	☐	☐
Trusts (If Applicable)	☐	☐	☐	☐

Is there anything in your estate planning that needs attention?

_____

_____

5. PROTECTION GAP REVIEW

Based on your checks above, list the most important protection gaps.

PROTECTION GAP IDENTIFIED	IMPACT (High / Medium / Low)
1.	
2.	
3.	

Which gap would have the biggest impact on you or your family?

_____

6. YOUR ACTION PLAN

Choose up to three actions to strengthen your protection.

ACTION	WHY THIS MATTERS	TARGET DATE
1.		
2.		
3.		

Protection is peace of mind.

Review regularly.
Update when life changes.
Protecting today creates security for tomorrow.

7. REVIEW DATE

Set a date to review your protection and keep it up to date.

I will review this checklist on: _____/_____/_____

This is one of the Five Pillars of The Market Man Method™.
Protection ensures you and your loved ones can face the future with confidence.

More free tools and resources are available to help you take action and build a better future.

Visit: themarketmanmethod.co.uk