

PLANNING TEMPLATE · PROTECTION

Insurance Coverage Inventory

Document all insurance policies, coverage amounts, and important contact information.

- Policy detail sections for all types
- Coverage amount documentation
- Premium tracking
- Contact information storage
- Renewal date reminders
- Annual cost summary

How to use

- 1. Gather all insurance policy documents
- 2. Record policy numbers and coverage amounts
- 3. Note premium amounts and payment schedules
- 4. Add agent/company contact information
- 5. Review annually for coverage gaps

Health

Insurer	Policy #	Coverage amount	Premium / frequency	Renewal date	Agent & phone

Life

Insurer	Policy #	Coverage amount	Premium / frequency	Renewal date	Agent & phone

Disability

Insurer	Policy #	Coverage amount	Premium / frequency	Renewal date	Agent & phone

Homeowners / Renters

Insurer	Policy #	Coverage amount	Premium / frequency	Renewal date	Agent & phone

Auto

Insurer	Policy #	Coverage amount	Premium / frequency	Renewal date	Agent & phone
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Umbrella

Insurer	Policy #	Coverage amount	Premium / frequency	Renewal date	Agent & phone
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Long-term care

Insurer	Policy #	Coverage amount	Premium / frequency	Renewal date	Agent & phone
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Beneficiaries on file

Policy	Primary beneficiary	Contingent	Last reviewed
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