

MEETING AGENDA

PROTECTION PLANNING

BARNUM
FINANCIAL GROUP
THE SKG TEAM

The below items will be discussed during our next meeting:

- Life changes - what's new or different?
- Discuss open enrollment timeline and changes (if applicable)
- Review of private coverages
- Estate planning
- Beneficiary update
- Is there anything else you want to ensure we cover?

SKG TEAM AT BARNUM FINANCIAL GROUP

565 TAXTER ROAD, SUITE 625
ELMSFORD, NY 10523

Follow us on social media to stay up to date on upcoming events.

