John Hancock
LIFE INSURANCE

Taking Another Look

Policy Review Tracking Sheet

Use this tracking sheet to capture activity as you conduct policy reviews with your clients.

AGENT NAME: _____

FIRM: _____

Client Name	Inforce Illustration		Opportunity to Improve Client's Coverage? (Y/N)	How can Coverage be Enhanced?	Client Meeting Scheduled On (Date)
	Date Ordered	Date Received			

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