

**INSUREGOOD**

C O M P A N Y

Protecting Legacies. Empowering Communities.

# The Insure Good Co. Checklist

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## 11 Things to Look for Before Choosing an Insurance Agent

A simple guide to help families choose an agent they can trust.

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not tomorrow.**

# The Insure Good Co. Checklist

## 11 Things to Look for Before Choosing an Insurance Agent

Choosing an insurance agent is not just about buying a policy. You are trusting someone to help you protect your family, your income, your children, your peace of mind, and your legacy. Use this checklist before you work with an agent.

### 1. They Listen Before They Talk

A good agent should ask questions before giving advice. They should want to understand your family, your budget, your health, your goals, and who you are trying to protect.

**Ask yourself: Did this agent listen to me, or did they just try to sell me something?**

### 2. They Take Time to Understand Your Real Life

Your policy should match your life. A good agent should ask about the details that actually affect your protection plan.

- Children
- Spouse or partner
- Mortgage or rent
- Income
- Debt
- Health conditions
- Medications
- Current coverage
- Long-term goals
- Final expense needs

**Ask yourself: Did this agent make recommendations based on my real situation?**

### 3. They Explain Insurance in Plain English

You should not feel confused after talking to your agent. A good agent can explain insurance in simple, relatable language.

- Term life
- Whole life
- Final expense
- Living benefits
- Cash value
- Child whole life
- Annuities
- Policy reviews

**Ask yourself: Did they explain things in a way I actually understood?**

### 4. They Are Honest About the Good and the Bad

Every policy has benefits, rules, limits, and costs. A trustworthy agent will explain what the policy does and what it does not do.

**Ask yourself: Did this agent tell me the full truth, or only the part that sounded good?**

### 5. They Follow Up and Communicate

Insurance is important. Communication matters. A good agent returns calls, responds to messages, explains next steps, and keeps you updated.

**Ask yourself: Do I feel like I can reach this person when I need help?**

### 6. They Do Not Pressure You

Life insurance is urgent, but you should not feel bullied into making a decision. A good agent educates you. A pushy agent pressures you.

**Ask yourself: Did I feel respected, or did I feel rushed?**

## 7. They Offer Options

Your family deserves options. A good agent should help you compare different types of protection based on your needs and budget.

- Term life insurance
- Whole life insurance
- Final expense coverage
- Living benefits
- Cash value strategies
- Child whole life
- Retirement protection
- Annuities

**Ask yourself: Did this agent show me options that fit my needs and budget?**

## 8. They Understand Family, Legacy, and Real-Life Pressure

Life insurance is not just paperwork. It is about what happens if life changes suddenly. Can your family stay in the house? Can the funeral be paid for? Can your children still have options?

**Ask yourself: Did this agent understand why protection matters to my family?**

## 9. They Know When to Refer You to Other Professionals

A good insurance agent can explain insurance, but they should also know when to recommend a tax professional, attorney, estate planner, or financial advisor.

**Ask yourself: Does this agent seem honest about what they know and what needs expert advice?**

## 10. They Care About the Community

A strong agent is not just trying to make a sale. They care about educating families, protecting communities, and helping people make better financial decisions before it is too late.

**Ask yourself: Does this agent feel connected to people, purpose, and community?**

## 11. They Make You Feel Safe Asking Questions

You should never feel embarrassed for not knowing insurance. Most people were never taught this. A good agent welcomes questions and makes space for clarity.

- How much coverage do I need?
- What if I already have insurance through work?
- Can I insure my children?
- What are living benefits?
- What is cash value?
- Can I afford this?
- Is my old policy still good?
- How do I become an agent?

**Ask yourself: Did this agent make me feel informed, safe, and respected?**

## Final Check

Before choosing an insurance agent, ask yourself:

- Did they listen?
- Did they explain clearly?
- Did they offer real options?
- Did they respect my budget?
- Did they avoid pressure?
- Did they answer my questions?
- Did they understand my family needs?
- Did they make me feel confident?

If the answer is yes, you may have found the right agent. If the answer is no, keep looking. Your family future deserves more than a quick sale.

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## The Insure Good Co. Standard

At Insure Good Co., we believe families deserve education before pressure. We help families understand life insurance, living benefits, final expense coverage, child whole life, cash value strategies, annuities, retirement protection, and policy reviews in plain English. We also help serious people learn how to become licensed insurance agents and partner in this mission.

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