



Insurance Policies Inventory

1. Make a list of the names of insurance companies, types of insurance, premium amounts, payment structures, coverage amounts and deductibles. Don't forget any protection policies you have purchased for cellphones or appliances.

Type of Insurance	Insurance Company Name	Annual Premium	Payment Method		Coverage Details	Deductible Amount	Names of Covered Individuals or Beneficiaries
			Deducted from Paycheck	Pay Manually			
Vehicle		\$				\$	
		\$				\$	
		\$				\$	
		\$				\$	
Health		\$				\$	
		\$				\$	
Home/Renter		\$				\$	
		\$				\$	
Umbrella		\$				\$	

Type of Insurance	Insurance Company Name	Annual Premium	Payment Method		Coverage Details	Deductible Amount	Names of Covered Individuals or Beneficiaries
			Deducted from Paycheck	Pay Manually			
Life							
		\$				\$	
		\$				\$	
Disability							
		\$				\$	
		\$				\$	
Products							
		\$				\$	
		\$				\$	
		\$				\$	
		\$				\$	
		\$				\$	
		\$				\$	
Umbrella							
		\$				\$	
		\$				\$	
		\$				\$	

- 2.** This is a great time to compile the contact information for customer service and the web address for each insurance firm you do business with. In addition, make note of whether or not you have an online account.

Account Type	Institution Name	Customer Service Number	Web Address	Online Account?

3. Review your coverage levels and see if they are meeting your current needs. You might determine you need to make changes to some of your policies.

My notes on coverage I should update:

4. Good job! Reviewing insurance policies is not the most exciting way to spend time. Yet, you did it! Though it may have been tedious now, in the event of an emergency, you will be glad that you gathered this information when you did.



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EMPLOYEE SERVICES