

COVERAGE CHECKLIST

8 essential questions designed to understand client needs, identify gaps, and ensure coverage aligns with client needs.



- 1 Can you walk me through the coverage you currently have?
- 2 What concerns or frustrations do you have about your current coverage or past experiences?
- 3 When you think about the future, what do you want your insurance coverage to protect you from?
- 4 How often do you typically use healthcare services?
- 5 Are there specific doctors, medications, or services that are important for you to keep?
- 6 How do you prefer to manage your insurance payments and monthly budget?
- 7 Have you ever had to use your insurance or navigate a claim?
- 8 What does “good coverage” mean to you personally?