



PROTECT THE BUSINESS

Insurance readiness conversation guide

Prepare before you speak to an adviser. This is educational — not a product recommendation.

Before the conversation

LOSSES I COULD NOT AFFORD ALONE (2–3 EXAMPLES)

WHAT THE BUSINESS DOES, WHERE IT OPERATES, AND KEY ASSETS

Ask

Questions worth asking

1. What would be included for my kind of business?
2. What would be excluded?
3. What records or security would be required?
4. What must I do after a loss?

MY TOP QUESTION FOR THE ADVISER

● NOTE

Suitable cover depends on the business. Do not assume every risk needs a policy or that every loss is covered.

Next step

WHO I WILL
CONTACT

TARGET DATE
