

How often should I review my annuity portfolio?

Financial Planning

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You should review your annuity portfolio as often as you would your other investments.

Depending on the type of annuity, you should review it at least once a year. Of course, a major change in your family such as a serious illness, a new baby or even starting a business should trigger a call to your insurance agent or company representative to discuss changes in your financial planning. If you change your plans, find out whether this will cost you anything and if so, how much.

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