

# ELEVATE WORKSHEET



## 2026 In-Book Marketing Plan

### Monthly

- ❖ AUTO POLICIES RENEWING NEXT MONTH \*\*
- ❖ FIRE POLICIES RENEWING NEXT MONTH \*\*
- ❖ LIFE POLICY ANNIVERSARY DATE NEXT MONTH \*\*
- ❖ BUSINESS RENEWALS (30 DAYS PRIOR TO RENEWAL)
- ❖ TURNING AGE 65 IN 8 MONTHS
- ❖ RETIREMENT PLANNING KEY AGES: 59, 62, 67, 70 AND 73
- ❖ ANNUITY RENEWALS

### January

- ❖ Homeowners No Auto \*\*
- ❖ 250/500/100 No PLUP
- ❖ See Monthly List

### February

- ❖ Auto No Fire \*\*
- ❖ 100/300/100
- ❖ Single Line Fire \*\*
- ❖ See Monthly List

### March

- ❖ Life Only Customers \*\*
- ❖ 50/100/50
- ❖ Customer Without an Email Address \*\*
- ❖ See Monthly List

### April

- ❖ State Minimum Auto Limits
- ❖ Eligible Customers Without DSS \*\*
- ❖ See Monthly List

### May

- ❖ Homeowners No Auto \*\*
- ❖ 250/500/100 No PLUP
- ❖ Auto No Life \*\*
- ❖ See Monthly List

### June

- ❖ Auto No Fire \*\*
- ❖ Single Line Fire \*\*
- ❖ See Monthly List

### July

- ❖ See Monthly List

### August

- ❖ Customer Without an Email Address \*\*
- ❖ See Monthly List

### September

- ❖ Eligible Customers Without DSS \*\*
- ❖ See Monthly List

### October

- ❖ Homeowners No Auto \*\*
- ❖ 250/500/100 No PLUP
- ❖ Auto No Life \*\*
- ❖ See Monthly List

### November

- ❖ Auto No Fire \*\*
- ❖ See Monthly List

### December

- ❖ See Monthly List

\*\* = Available in Dashboard Campaign

