

LIFE SETTLEMENT WORKSHEET

MADISON BROKERAGE CORP (MBC) LIFE SETTLEMENT WORKSHEET

Agent Name: _____
Insured Name (1): _____
Insured Name (2): _____
Face: _____ Issue Date: _____

Agent Phone: _____
Insured (1) DOB: _____
Insured (2) DOB: _____
State: _____ Carrier: _____

CLIENT AGE AND GENDER

1 pt _____ Male age 75 or less Female age 77 or less
2 pts _____ Male 76-79 Female 78-81
3 pts _____ Male 80-84 Female 82-86
4 pts _____ Male 85+ Female 87+

**Two insureds (SUL, 2nd to die) use age on policy*

MEDICAL CONDITION

1 pt _____ Healthy active senior: could receive Standard rating with most carriers
2 pts _____ Minor health problems: All impairments under control
3 pts _____ Health has changed considerable since policy issue
4 pts _____ Insured has developed a terminal illness

POLICY TYPE

1 pt _____ Joint Survivorship (both insureds are living) or Whole Life
2 pts _____ Term Life
3 pts _____ Universal Life or Term Convertible to Universal Life
4 pts _____ Joint Survivorship with one deceased

CURRENT CASH SURRENDER VALUE OF POLICY AS % OF DEATH BENEFIT

1 pt _____ 16 % +
2 pts _____ 11 % - 15%
3 pts _____ 6% - 10%
4 pts _____ 0 % - 5%

CURRENT PREMIUMS AS A % OF THE DEATH BENEFIT

1 pt _____ 5% +
2 pts _____ 3% - 4%
3 pts _____ 2% - 3%
4 pts _____ 1% - 2%
**Minimum level annual premium to maturity*

_____ = **TOTAL SCORE**

Designed to perform a preliminary evaluation to qualify for Life Settlement and does not guarantee eligibility. Intended for insurance and financial professionals only, and not for the general public.



All securities transactions
will be facilitated through
the Leaders Group, Inc.
Member FINRA/SIPC.

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