

Madison Brokerage Policy Audit Form

www.MadisonBrokerage.com

Life Insurance Policy Information

Do you currently own any life insurance policies?
If yes, how long ago were they purchased?
Have your policies ever been reviewed?
Why was this coverage purchased?
Has your health changed since coverage was purchased?
Were you a smoker, if yes, have you recently stopped?

Policy 1 Details

Carrier	Date of Issue
Face Amount	Cash Value
Original Interest Rate	Current Interest Rate
Insured	Relationship To You
Beneficiary	Relationship To You
Policy Type	Outstanding Loan Amount
Annual Premium	Years to Pay
Surrender Penalty Period	Purpose of Insurance
Riders	Payment Mode

Policy 2 Details

Carrier	Date of Issue
Face Amount	Cash Value
Original Interest Rate	Current Interest Rate
Insured	Relationship To You
Beneficiary	Relationship To You
Policy Type	Outstanding Loan Amount
Annual Premium	Years to Pay
Surrender Penalty Period	Purpose of Insurance
Riders	Payment Mode