

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?

POLICY 1 DETAILS

Carrier

Face Amount

Original Interest Rate

Insured

Beneficiary

Policy Type

Annual Premium

Surrender Penalty Period

Riders

Why was this coverage purchased?

Has your health changed since coverage was purchased?

Were you a smoker, if yes, have you recently stopped?

Date of Issue

Cash Value

Current Interest Rate

Relationship To You

Relationship To You

Outstanding Loan Amount

Years to Pay

Purpose of Insurance

Payment Mode

POLICY 2 DETAILS

Carrier

Face Amount

Original Interest Rate

Insured

Beneficiary

Policy Type

Annual Premium

Surrender Penalty Period

Riders

Date of Issue

Cash Value

Current Interest Rate

Relationship To You

Relationship To You

Outstanding Loan Amount

Years to Pay

Purpose of Insurance

Payment Mode