

Request for Existing Life Insurance Policy Illustration

To: _____
(Current Insurance Company)

Re: Policy Number(s): _____

To Whom It May Concern:

I hereby grant _____ access to any and all information from your company pertaining to me and any of my life insurance policies.

Owner's Name: _____ Owner's SSN: _____

Owner's Signature: _____ Date: _____

Insured's Name: _____ Insured's DOB: _____

Please forward a current status (cash values, loans, etc.) and an existing illustration on the above referenced insurance policies. The existing illustration should have the following:

Current and guaranteed hypothetical interest rate

or

Hypothetical rate of return of: 0% 6% 8% other ___% (not to exceed 12%)

Type of in-force illustration(s) requested:
(Check all that apply)

Full Pay: Pay scheduled premiums all years

Limited Pay: Scheduled premium payments stop when values adequate to endow policy

Solve for level premium to endow policy

Current account value, surrender value and beneficiary designations

Other: _____

I authorize you to forward this information via fax to _____
(Name)

(Fax)