

LIFE-LOCK



Broader support designed to keep you prospecting, not processing.

LIFE INSURANCE FACT FINDER

CLIENT PROFILE

To most effectively help find coverage options, we need to gather as much information as possible. Once completed, we will review all the information provided and begin formulating the most suitable recommendations available.

Name: _____ DOB: _____ Date: _____
 Male Female

Tobacco Use: Non-Smoker Smoker Other (Specify Type) _____

Policy Type Requested: GUL FUL IUL Whole Life Term (Specify Length) _____

Riders: Return of Premium Term Rider (Specify Length) _____ Living Benefits
 Second to Die (Spouse Age) _____ Loan Protection Waiver of Premium

Face Amount: _____ Premium: _____ Premium Mode: _____

Height: _____ Weight: _____

U.S. Citizen? Yes No If no, specify country of citizenship, visa type, and expiration date: _____

If traveling outside the U.S., specify countries, dates, and durations: _____

Avocations: Aviation SCUBA Diving Racing Other (specify) _____

Criminal, driving, moving, or DUI history in the past 5 years? Yes No
If yes, specify dates, instances, and type of charge (Misdemeanor/felony): _____

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IN-FORCE ILLUSTRATION REQUEST

REQUEST FOR IN-FORCE POLICY INFORMATION TO:

Insurance company: _____
Address: _____
Fax: () _____ Phone: () _____
Policy number(s): _____

I, the policyowner, request the following information regarding my life insurance policies listed above.

REQUEST FOR IN-FORCE ILLUSTRATION

The following in force illustrations are requested:

- Paying necessary premiums to maturity with \$1,000 cash value at age 100 or policy maturity age if sooner.
- Assuming no future premiums paid.
- Continue paying current scheduled premiums to maturity.

Assume the following interest rates for each illustration: _____ % _____ % _____ %

REQUEST FOR CURRENT POLICY INFORMATION

Current annual statement and/or:

<input type="checkbox"/> Owner	<input type="checkbox"/> Loan Balance	<input type="checkbox"/> Other _____
<input type="checkbox"/> Insured	<input type="checkbox"/> Loan Interest Rate	
<input type="checkbox"/> Beneficiary	<input type="checkbox"/> Crediting Method	
<input type="checkbox"/> Premium Paid	<input type="checkbox"/> Invol. Allocations	
<input type="checkbox"/> Accumulation Value	<input type="checkbox"/> Current Interest Rate	
<input type="checkbox"/> Net Surrender Value	<input type="checkbox"/> Policy Fees, Loans, and Charges	
<input type="checkbox"/> Net Death Benefit	<input type="checkbox"/> Additional Rider Costs	

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POLICY COMPARISON

PREPARED FOR: _____
PREPARED BY: _____ PHONE: _____

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Sharpen your sales presentation using our non-branded Fact Finder.

Submit to our underwriting department and we will shop available plans for you.

The In-Force Illustration Request, signed by your client, gives you permission to request in-force policy information.

Are you helping clients shop for additional or replacement coverage?

Our Policy Comparison booklet allows you to spreadsheet both policies side by side.



800.329.5799
www.PIMSCO.com