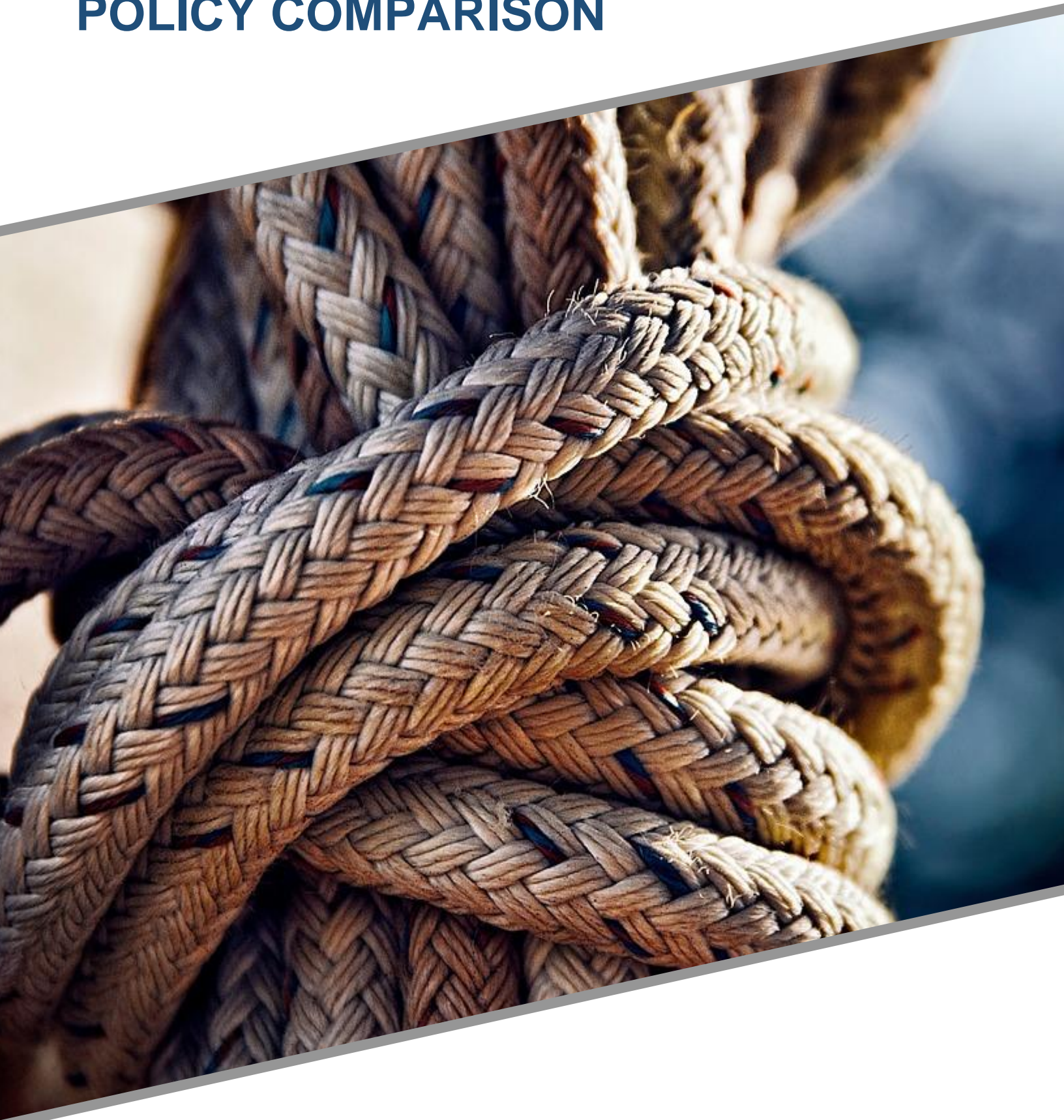


POLICY COMPARISON



PREPARED FOR: _____

PREPARED BY: _____

PHONE: _____



POLICY COMPARISON

Similar to the policy review, we believe a written comparison is essential when new strategies are recommended. Specifically, to ensure that you have the opportunity to look at both options in a thorough, detailed, and unbiased view. Our goal is to give you the most information as possible, so you can understand how the proposed strategy may better benefit you and your benefactors.

Client Name: _____ **DOB:** _____

	Existing Policy	Proposed Policy
Insurance Company		
Financial Rating		
Policy Type		
Death Benefit		
Premium		
Total Premium Paid		N/A
Total Cash Value		N/A
Lapse Date Based on Guarantees		
Lapse Date Based on Current Projections		

Additional comments: _____

