

SUMMARY OF CURRENT LIFE INSURANCE



Advisor/Firm:	
Primary Insured Name:	
Date of Birth:	
Risk Class:	

State:	
Secondary Insured Name:	
Date of Birth:	
Risk Class:	

Carrier	Policy Number	Issue Date	Product Type	Surrender Value	Loans	Net Death Benefit	Premium	Billing Mode	Policy Basis	Policy Owner	Beneficiary	Date of Values

Coverage Summary	Total Surrender Value	Total Loans	Total Net Death Benefit	Total Annual Premium

PROPOSED OPTIONS											
Carrier	Contract	Premium	Years Paid	*Guar. Period (Years)	**Current Assumption Period (Years)	Illustrated Rate / (IUL) Min & Cap	Cash Value In	Monthly LTC Benefit	Total LTC Benefit	Death Benefit IRR at	

Comments:	

* Guarantee Period Based on Minimum Credited Interest Rate & Maximum Mortality Charges All Years
 ** Current Assumption Period Based on Current Crediting Rate and Current Mortality Charges All Years