

In-Force Illustration Request



Policy Information

Carrier _____ Date _____
Insured _____ Policy # _____
Writing Agent _____

Request for in-force illustrations

The following in-force illustrations are requested:

- As-is
- Solve for necessary premium to keep policy inforce to maturity or to age _____
- No further premiums
- Using current premium, solve for face amount that will carry to maturity.

*If the policy is variable, please use a _____ % rate of return.

Request for current policy information

Please provide the following policy information on the above referenced policy:

- | | | |
|--------------------------------------|--|---|
| <input type="checkbox"/> Owner | <input type="checkbox"/> Net Surrender Value | <input type="checkbox"/> Current Annual Statement |
| <input type="checkbox"/> Insured | <input type="checkbox"/> Net Death Benefit | <input type="checkbox"/> Loan Balance |
| <input type="checkbox"/> Beneficiary | <input type="checkbox"/> Premiums Paid | <input type="checkbox"/> Cost Basis |
| <input type="checkbox"/> Cash Value | <input type="checkbox"/> Premium Due Date | |

Additional Information / Requests

Delivery Information

My signature below authorizes your company to release the requested information to:

Agent Name: _____ Firm _____
Address _____ City, State, Zip _____
Phone _____ Fax _____ Email _____

Thank you.

Policyowner