

Product Proposal/Illustration Request Form (Fax to 518.371.6131)

<u>Life</u> : Face Amount Term Yrs.? Trac	d. UL Guar. No Lapse UL IULWL
Waiver? Y/N Level/Increasing Death Benefit? Riders?	
Solve for Value?1035 Exchange? Y/N If Y, amount?LTC/Chronic Rider? Y/N	
LTCI : Partnership: Y/N - Daily/Mo. Benefit	Benefit Period: Yrs Elim. Period 30-90 Days
Inflation %, if Desired or GPO?Home Care %Riders	
<u>Linked Life/Annuity</u> (circle): Single/Annual Premium Amount 1035 Exchange? Y/N	
LTC Daily/Monthly Benefit Desired	No. Of Years Inflation? Y/N
<u>DI</u> : OccupationSpecific Duties	
Own Business? If so, Classification – Sole Prop S-	
Mon./Ann. Income (after expenses)? \$	
Waiting Period – 60-90-120-180-365-730days Benefit period – 2yrs5 yrsto Age 65-to Age 67	
Disability Coverage (Individual or Group) Inforce? Details	
Annuity: Immediate-SPIA/Deferred (circle) - Desposit Amount? Tax Qualified?	
Deferred: Traditional/Indexed (circle) SPIA: Income Desired? Mode: Monthly/Annually (circle)	
SPIA: Life Only Y/N-Period Certain (# years) Installment Refund Y/N – Survivor Bene.%-100/66/50	
Other Product/Rider Requests:	
Duo dingga Magasi	Phone:
Producer Name:	Phone.
Fax:	Email:
State of Application:	Firm Affiliation:
	0 /2 25
Client Name: M/F	Spouse/Partner Name: M/F
D.O.B. or Age:	D.O.B. or Age:
D.O.D. of Age.	D.O.D. of Age.
Tobacco Use (last 24 Months): Y/N	Tobacco Use (last 24 Months): Y/N
	, ,
Prescriptions (Dosage/Frequency)?	Prescriptions (Dosage/Frequency)?
	11 11 0 17 2
Health Conditions?	Health Conditions?

Our Policy is Taking Care of You

Long-Term Care | Life | Disability | Annuities | Medicare | Benefits

Affiliate Company of



Need Help? 800.695.8224: Life-Option 3 LTC-Option 2; Linked/Life - x100/126 Linked/Annuity - x109 DI - x132